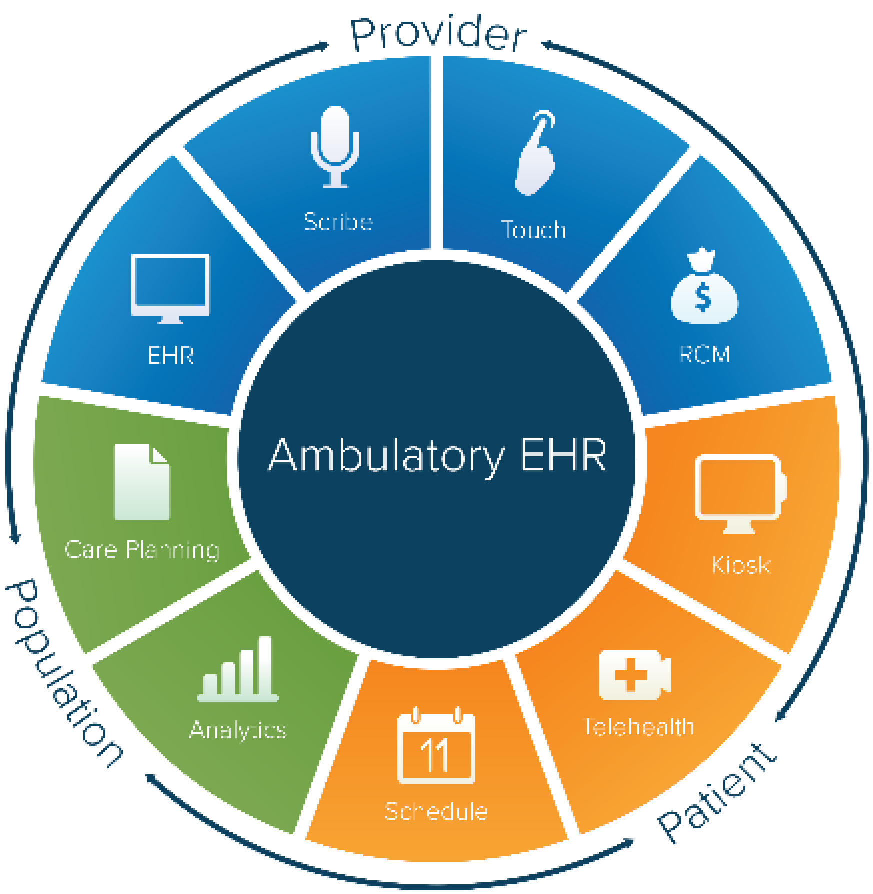
eClinicalWorks

Business Analysis Department

END USER WORKBOOK - FRONT OFFICE II

Kentucky Department for Public Health—March 2017



CONTENTS

FRONT OFFICE II WORKFLOWS

The following sections describe the workflows covered in eCW 101 Front Office II for V10e.

For more information about these workflows, and V10e, refer to the documentation available on the my.eclinicalworks.com Customer Portal.

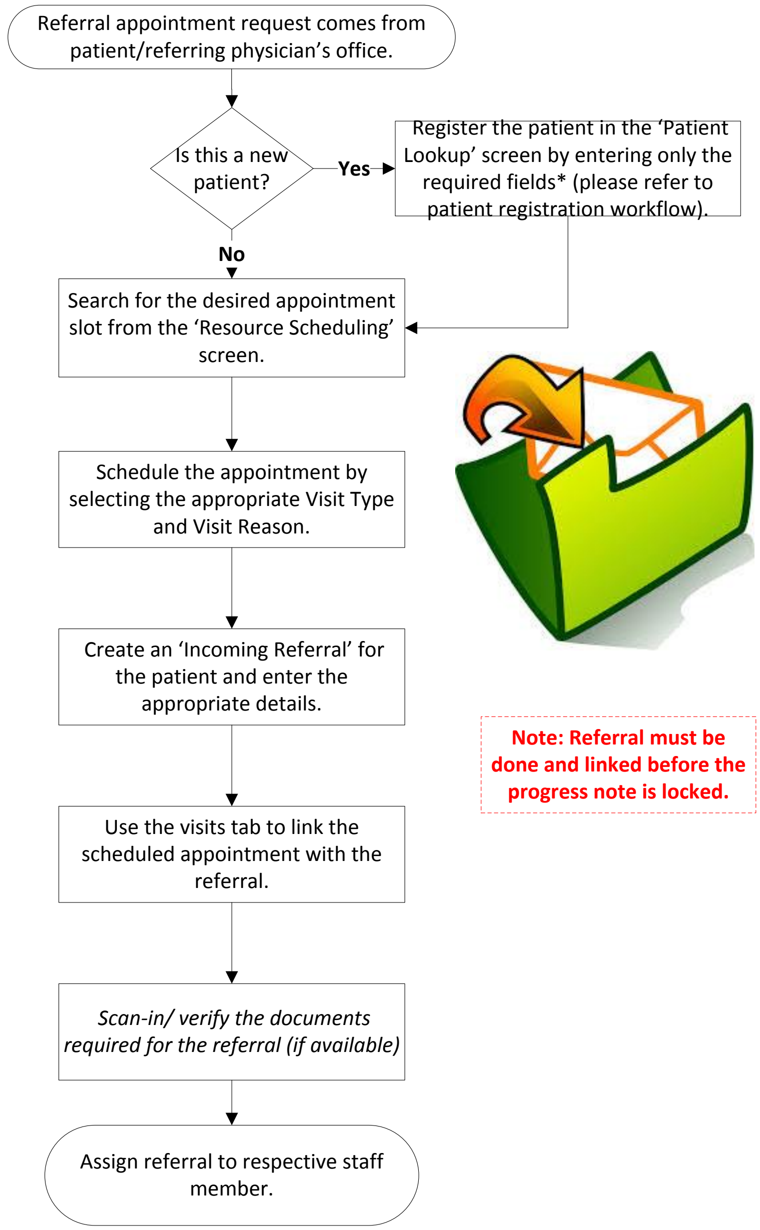
Note: For information about patient safety, refer to the Patient Safety Advisory Letter, available on the my.eclinicalworks.com Customer Portal.

Referrals

There are two types of referrals in eClinicalWorks: Outgoing referral and Incoming referral

Primary Care practices uses only the Outgoing referral since the patient can be seen without a need of an authorization. On the other hand, Specialty offices use the Incoming referral feature since some insurances require the patient's appointment and the Outgoing Referral to be the authorized prior to the visit.

Incoming Referrals



Note: Referral must be done and linked before the progress note is locked.

Path: *Main Menu > Practice icon > Resource Scheduling > Appointment window*

OR

Patient Lookup > Patient Hub

To create an incoming referral:

1. From the Appointment window, click *Referrals*.

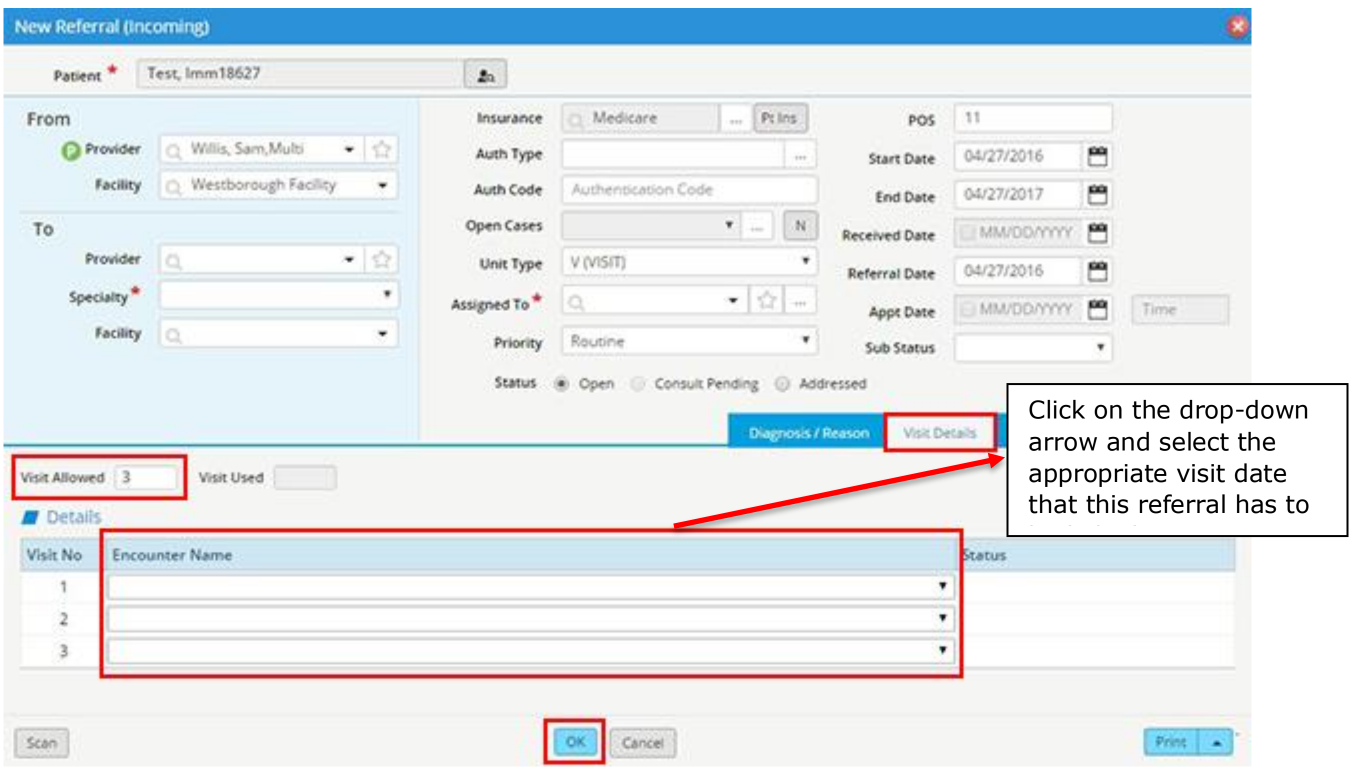
   OR

   From the Patient Hub, click the *Referrals* button.
2. In the Referrals window, select the *Incoming* tab.

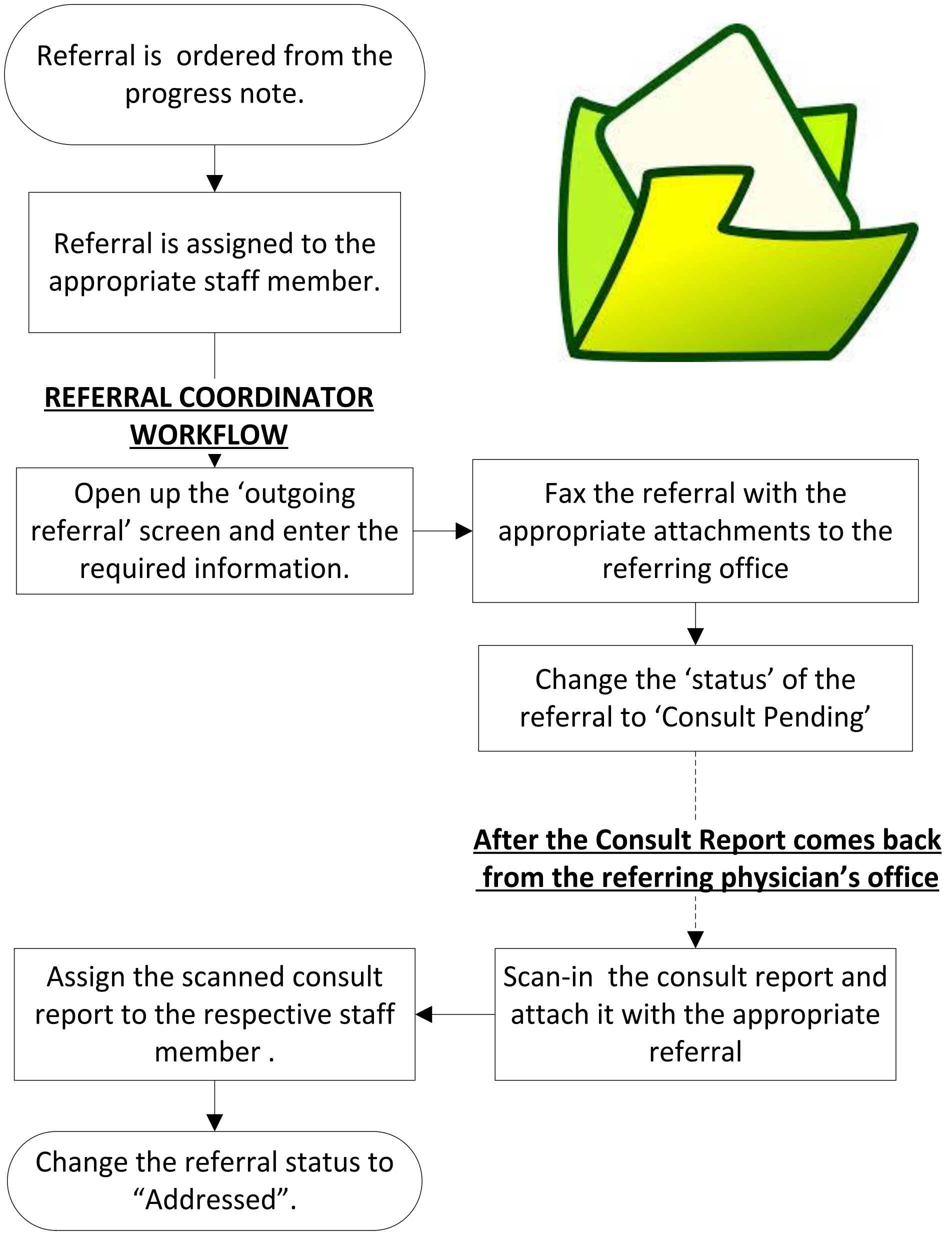
3. Click the *New* button:

The New Referral (Incoming) window opens.

4. Document the details of the referral as needed.
5. To link the incoming referral with the appointment, click the *Visit Details* tab.
6. Enter the number of *Visit Allowed*.
7. From the Encounter Name drop-down list, select the applicable *Visit Date*.
8. Click *OK*:



Outgoing Referrals



Path: *Main Menu > Practice icon > Resource Scheduling*

To create an outgoing referral:

1. From the Resource Scheduling window, double click an appointment to open.
2. From the Appointment window, click *Referrals*.

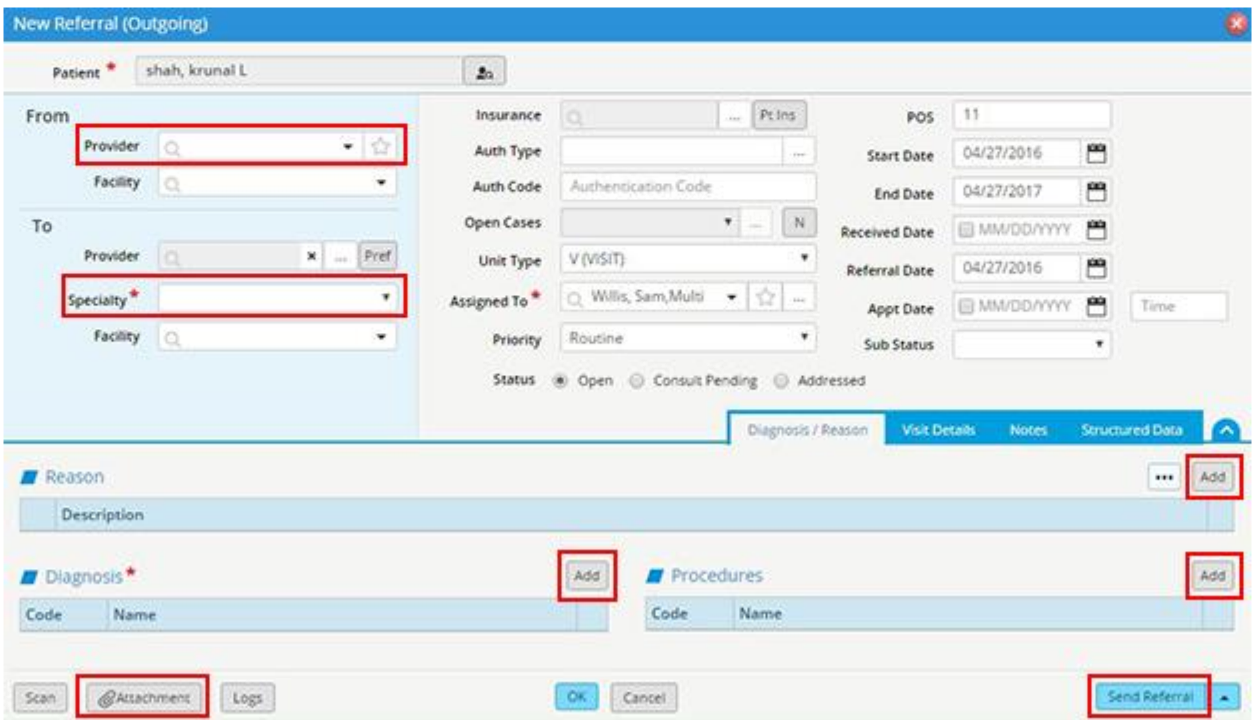
   OR

   From the Patient Hub, click the *Referrals* button.

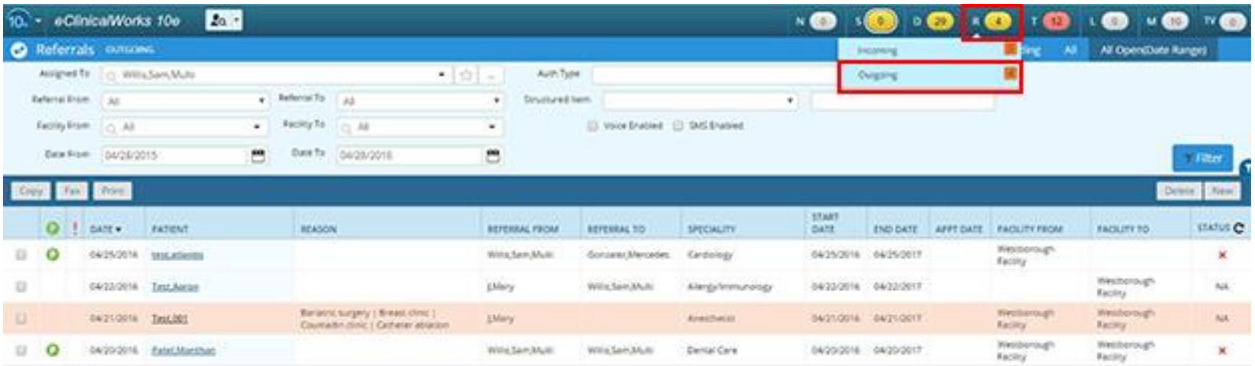
   The New Referral (Outgoing) window opens.

Note: In addition, clinicians can initiate an outgoing referral from the Progress Note.

3. In the *From* section, select the provider name from the *Provider* drop-down list.
4. In the *To* section, select the specialty of the provider from the *Specialty* drop-down list.
5. On the *Reason* tab, click *Add* button to specify the reason for referral.
6. On the *Diagnosis* tab, click the *Add* button to specify the diagnosis code.
7. On the *Procedure* tab, click the *Add* button to specify the procedure.
8. To attach the attachments like, Progress Note, lab or DI results, etc., click the *Attachment* button.
9. If the provider wants to add notes or special instructions, click on the 'Notes' tab and enter the information.
10. Once completed, provider assigns the referral to the Nurse/Referral Coordinator. Nurse/Referral Coordinator can complete the referral process.



The assigned referral to user is found on the *R* Quick-Launch(Jelly Bean) button:

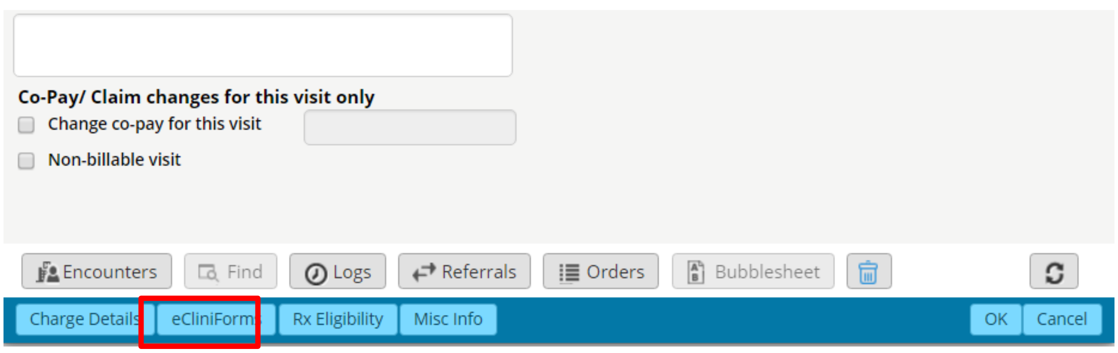


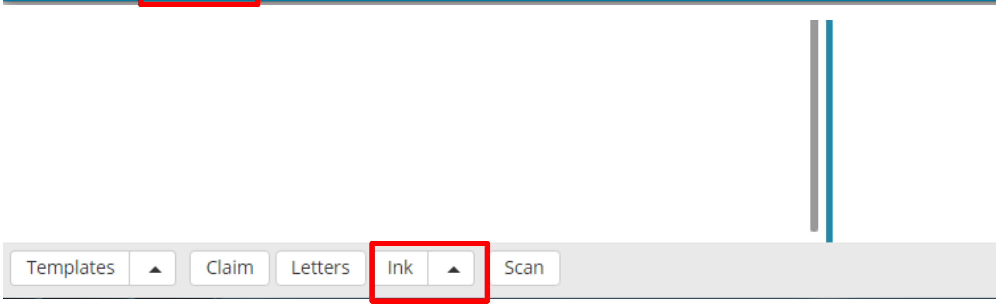
eCliniForms (Overview)

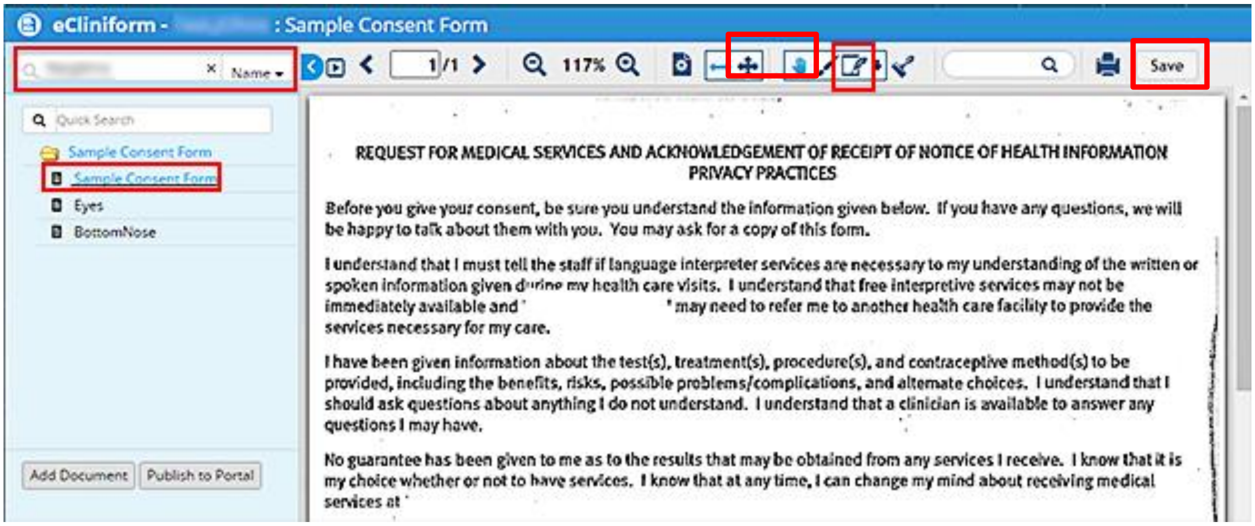
Paper forms that providers or patients must sign and are not available in the EMR system (some insurances or facilities require unique paper forms) can be uploaded as eCliniForms.

Note: eCliniForms can be utilized with signature pads or iPad® tablets (if applicable).

1. To use the eCliniForm from the appointment screen, click 'eCliniform', and from the progress note, click 'Ink' and select the desired eCliniForm from the list and click 'Ink Doc' button.





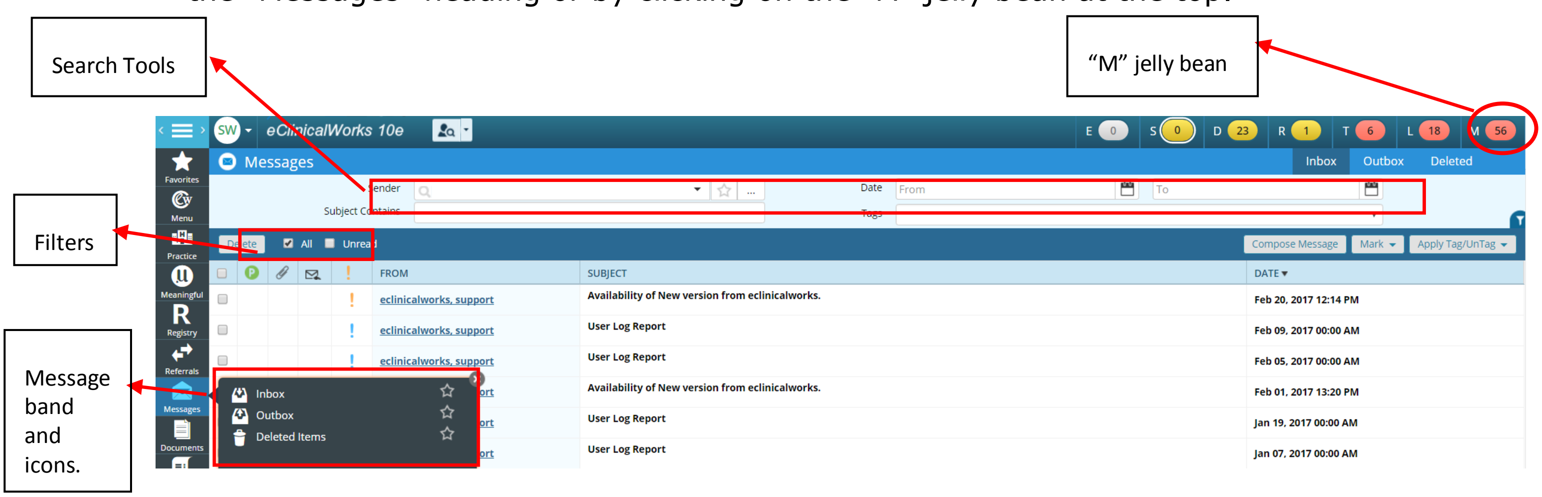


2. Click the Signature icon and click the location in the document to place the signature:
3. User the signature pad or iPad tablet to sign the document. Click Save to save the document in the patient's record.

Messaging

The messaging feature in eClinicalWorks allows staff and providers to send and receive messages internally.

Messages in eClinicalWorks can be accessed in two ways: from the navigation band under the "Messages" heading or by clicking on the "M" jelly bean at the top.



4. The messages band provides access to incoming messages, lets you send messages and provides a way to delete old messages.
5. The 'M' jelly bean can display different information that is useful to the user:

   a. The number displayed on the 'M' jelly bean corresponds to the number of unread messages in your inbox.
   b. Red 'M' jelly bean means that there is an 'emergent' message.
   c. Yellow 'M' jelly bean means that there is an 'urgent' message
   d. Gray 'M' jelly bean means that there is a 'routine' message.
6. Clicking on the 'M' letter will also give options to access the inbox or outbox.
7. The users can compose a new message by clicking on 'Compose' or 'Create New Message' button.
8. Unlike other jelly bean items attached to a patient (Telephone Encounters, Labs, Actions, etc.), messages are private between the sender and the recipient.

Note: This feature is not used for any clinical documentation for a patient. The clinical documentation regarding a patient needs to be done through a telephone encounter.

Actions

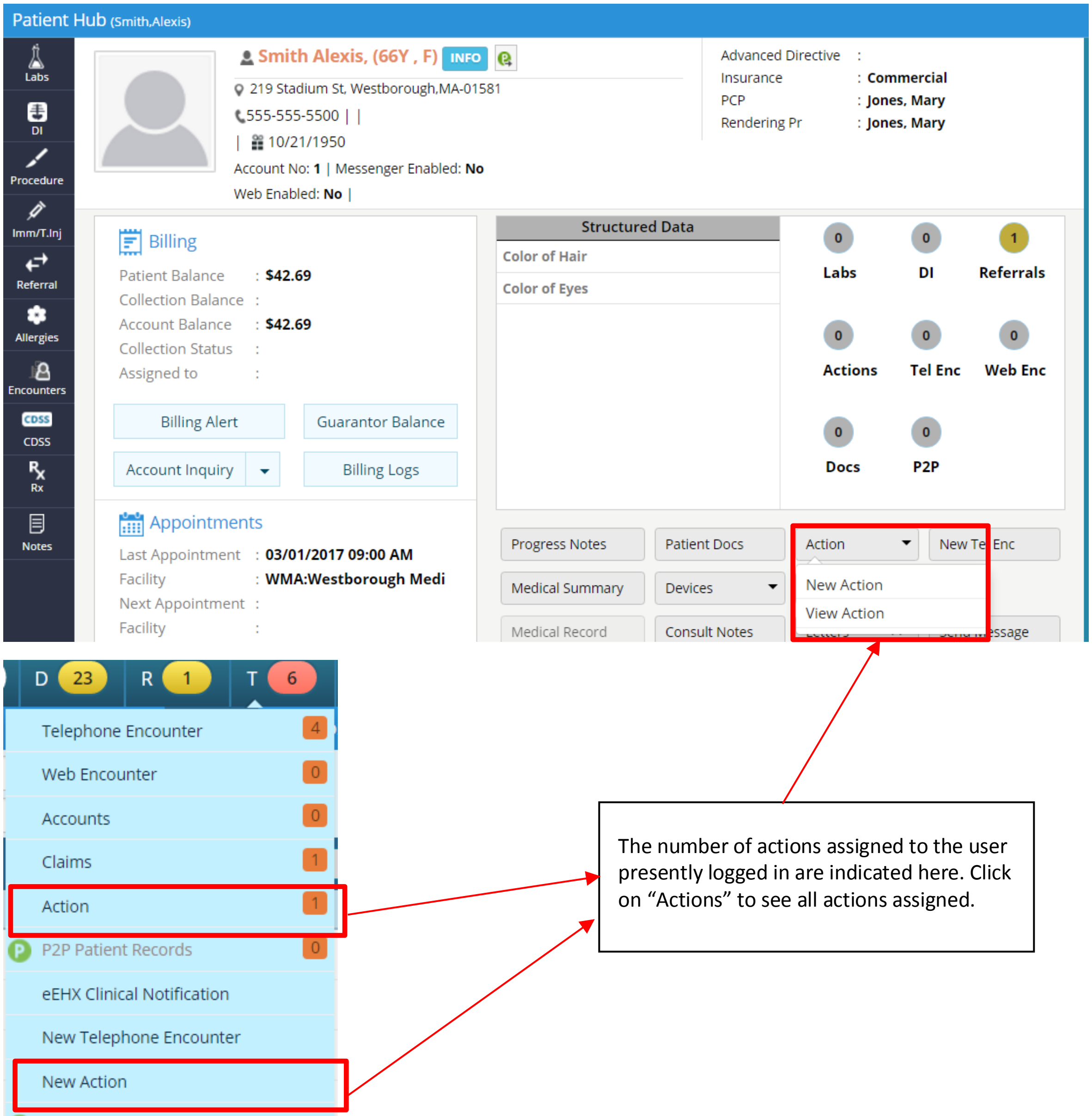
Creating an Action

Path: *T Quick Lunch link > Actions*

OR

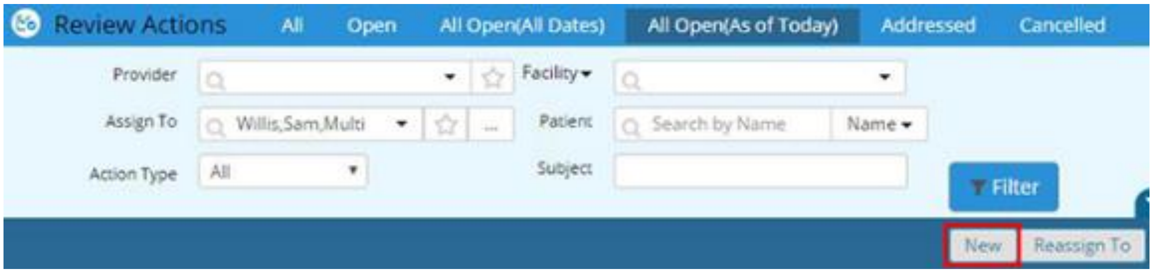
Patient Hub > Actions

Action feature enables user to create and assign task to different staff members in the practice.


Patient Hub (Smith,Alexis)
Smith Alexis, (66Y , F) INFO
219 Stadium St, Westborough,MA-01581
555-555-5500
10/21/1950
Account No: 1 | Messenger Enabled: No
Web Enabled: No
Advanced Directive :
Insurance : Commercial
PCP : Jones, Mary
Rendering Pr : Jones, Mary
Billing
Patient Balance : $42.69
Collection Balance :
Account Balance : $42.69
Collection Status :
Assigned to :
Billing Alert
Guarantor Balance
Account Inquiry
Billing Logs
Appointments
Last Appointment : 03/01/2017 09:00 AM
Facility : WMA:Westborough Medi
Next Appointment :
Facility :
Structured Data
Color of Hair
Color of Eyes
Labs DI Referrals
Actions Tel Enc Web Enc
Docs P2P
Progress Notes
Patient Docs
Action
New Action
View Action
Medical Summary
Devices
Medical Record
Consult Notes
Labs DI Procedure Imm/T.Inj Referral Allergies Encounters CDSS Rx Notes
D 23 R 1 T 6
Telephone Encounter 4
Web Encounter 0
Accounts 0
Claims 1
Action 1
P2P Patient Records 0
eEHX Clinical Notification
New Telephone Encounter
New Action
The number of actions assigned to the user presently logged in are indicated here. Click on “Actions” to see all actions assigned.

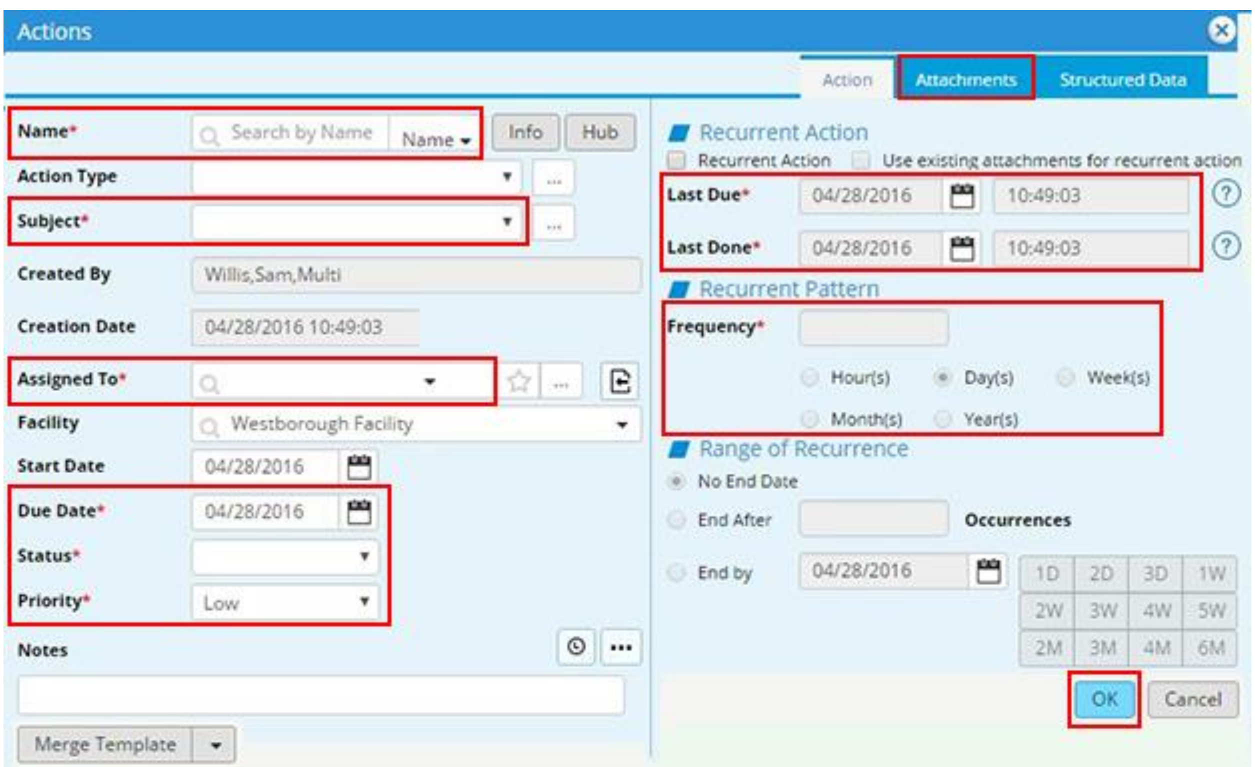
To create an action:

1. From the Review Actions window, click the *New* button:



   The Actions window opens.

2. From the Name drop-down list, enter the *Name* of the patient.
3. From the subject drop-down list, select the *Subject*.
4. Enter the *Due Date*, *Status*, and the *Priority*.
5. Select *Assigned To* Provider.
6. To add any attachments from the patient documents, click the *Attachment* tab.
7. From the Recurrence Action section, enter the *Last Due* and *Last Done* date and time.
8. From the Recurrence Pattern section, select the appropriate radio button to enter *Frequency*.
9. Click *OK*:

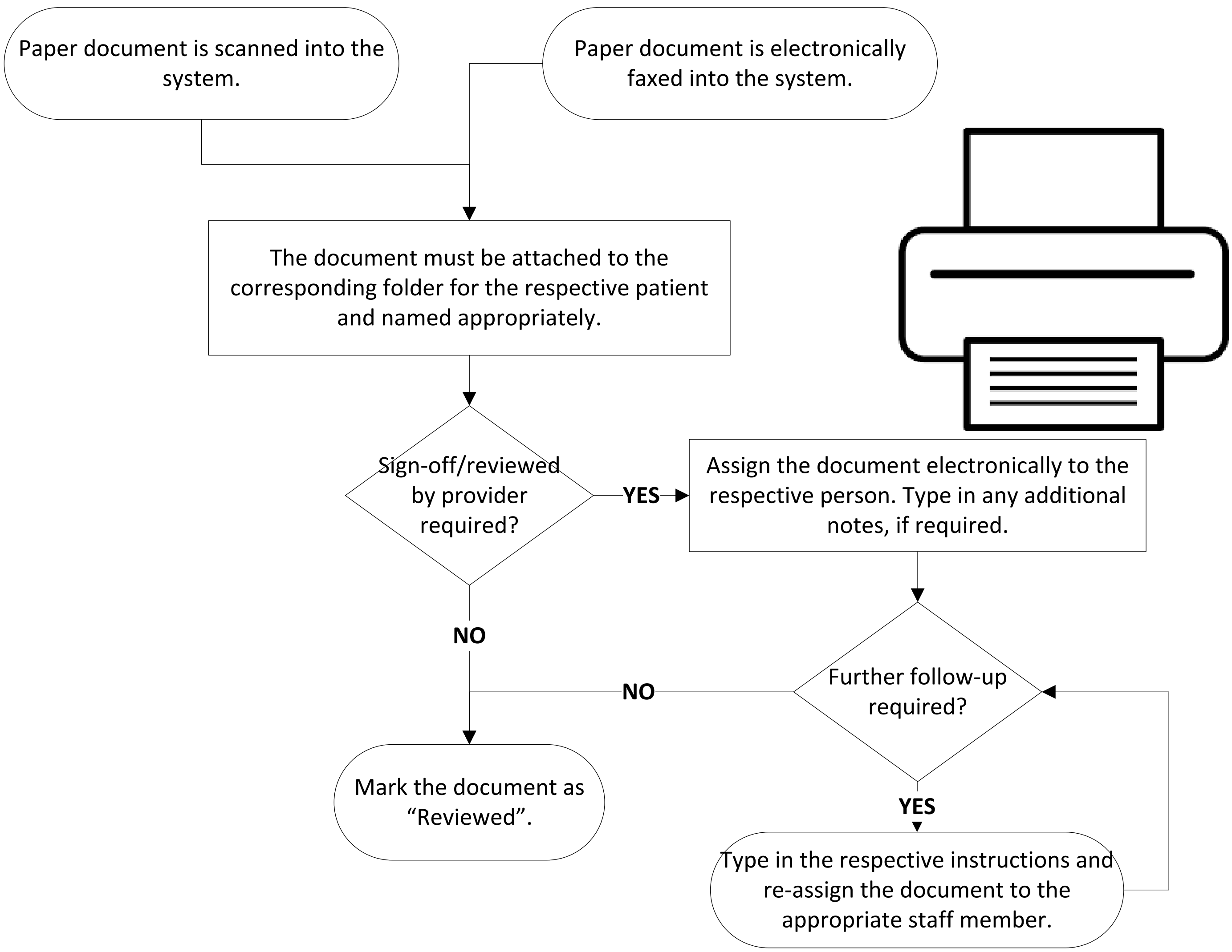


Document Management

eClinicalWorks comes with document management feature which enables:

- Staff to scan the patient's document into the system and attaches the document to the electronic chart (consent forms, lab result, consult reports, etc.).
- External entities to fax documents directly into the EMR system (the document is faxed electronically into the system and the staff is able to attach the document to the patient's electronic chart).

The below workflow illustrates the management of documents that are scanned into the system and that are faxed into the system.

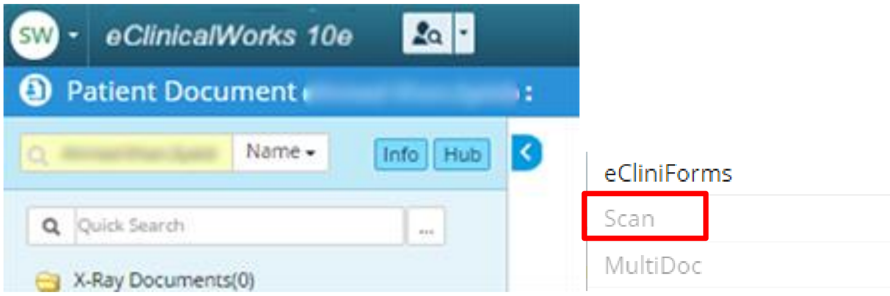


Scanning Documents

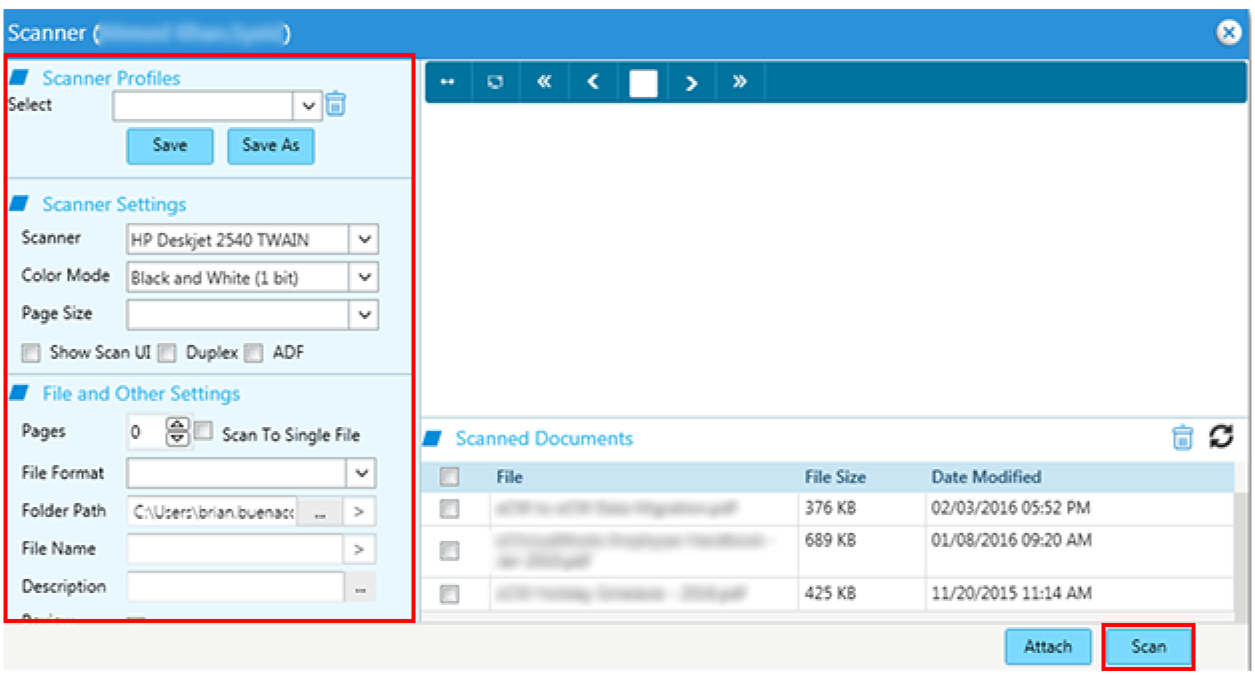
1. The eClinicalWorks scanning module can be accessed by clicking on the “Patient Documents” icon under the “Documents” band in the left navigation panel or from the Patient Hub.

To scan a document and save it in Patient Documents:

1. In the Patient Documents window, search for and select the patient:



2. From the Options drop-down list, click Scan.
3. From the Scanner window, configure the scanner settings.
4. Feed the document into the scanner and click Scan:



The documents generate in the scan bucket. Scanned documents are temporarily stored in the Scanned Documents section of this window.

The following scanning options are available:

Option	Description
Scan Duplex	Enables users to scan both sides of the document.
Scan to Single File	Enables users to scan multiple documents (pages) into one electronic file.
Color Mode	Enables users to scan documents in black and white, grey scale, or color.
File Format	Enables users to scan documents in .tiff, .pdf, .jpg, or .png files.
Pages	Enables users to define the number of documents to be scanned.
DPI	Enables users to define the quality of the documents.
Show Scan UI	Enables users to display the scanner's user interface to configure additional settings.
ADF	Enables users to enable or disable the Automatic Document Feeder functionality.

Attaching a Scanned Document to the Patient's Chart

Path: *Main Menu > Documents icon > Patient Documents*

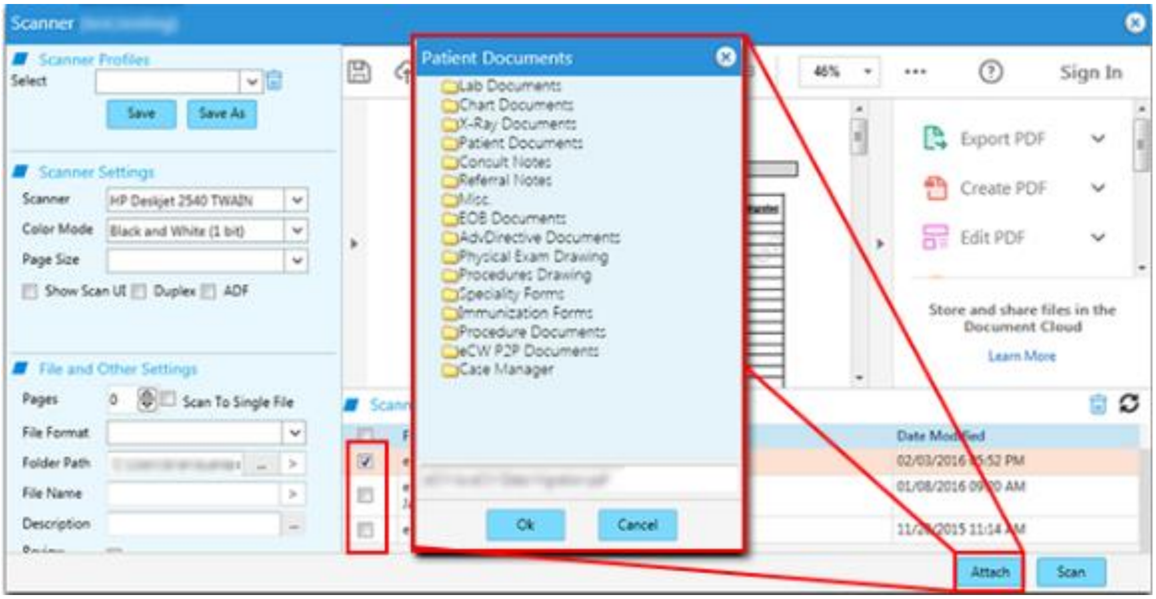
OR

Patient Lookup icon > Patient Hub > Patient Docs button

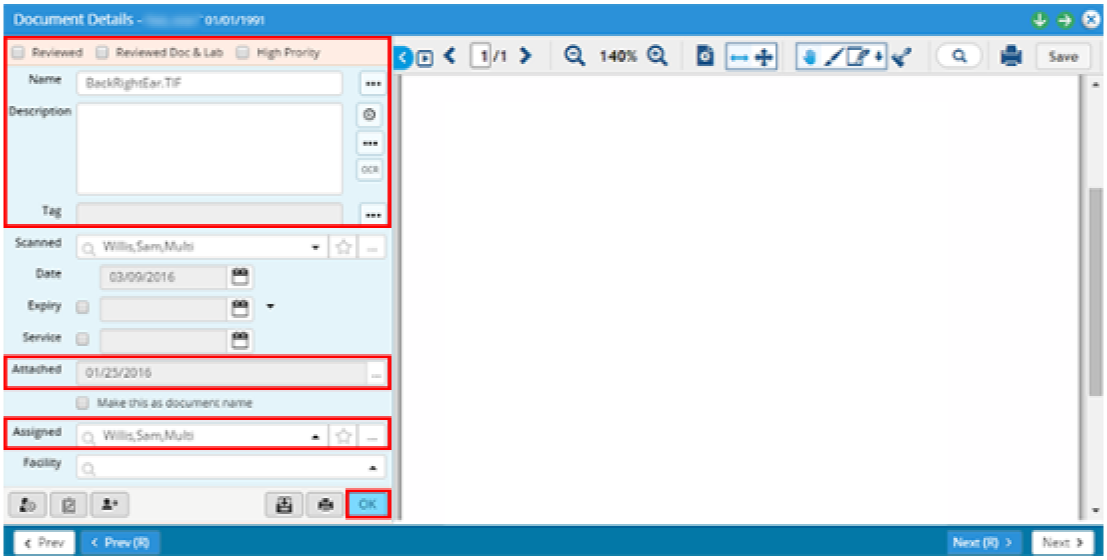
To attach a scanned document to the patient chart:

1. In the Patient Documents window, search for and select the patient.
2. From the *Options* drop-down list, click *Scan*.
3. From the Scanner window, scan the document.
4. In the Scanned Documents section, ensure that the file name has been documented for the scanned document.
5. Check the box next to the document, and click *Attach*.

6. In the Patient Documents window, select the folder to move this document and click *OK*:

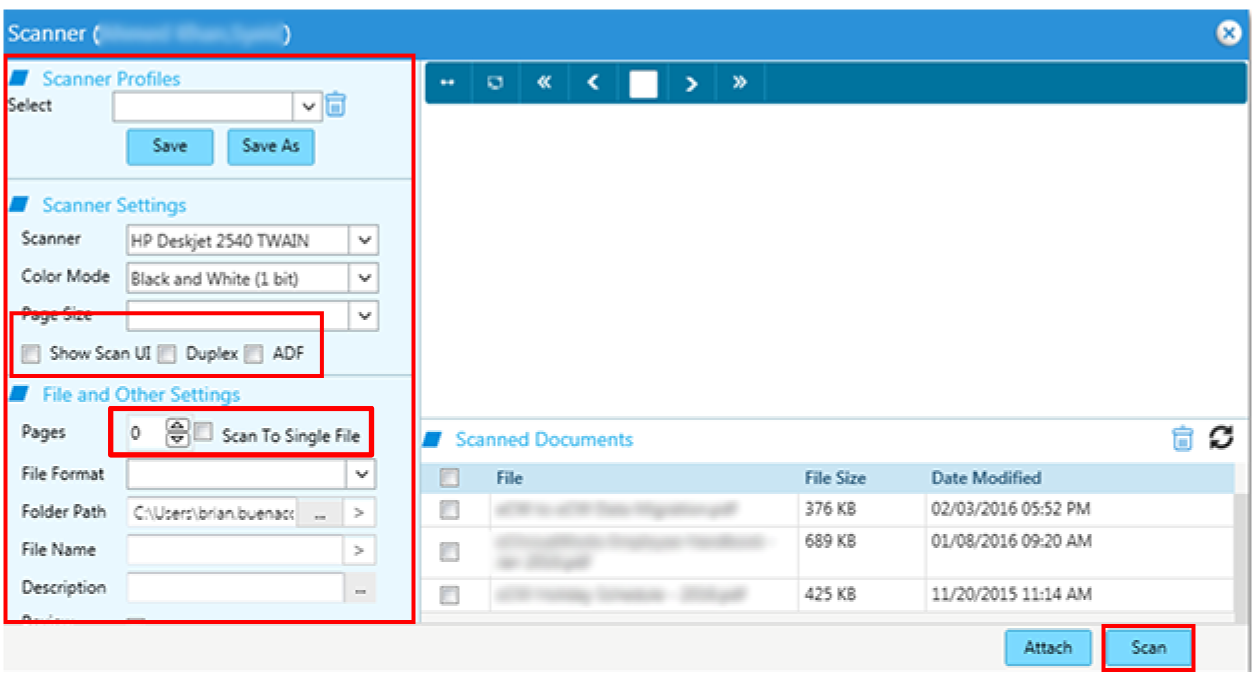


7. From the Document Details window, enter a Name and Description for the document.
8. (*Optional*) Attach the document to a lab or DI order.
9. (*Optional*) Add a document Tag.
10. (*Optional*) Select one of the review options:
    - **Reviewed** – check if a sign-off is not required.
    - **Reviewed Doc and Lab** – check if a sign-off is not required and the lab has been reviewed.
    - **High Priority** – check if the document is high-priority; when this document is assigned to another user, their D Quick-Launch button will display red.
11. (*Optional*) Assign the document to another user.
12. Click OK:



Scanning two-sided documents

Two-sided scanning can be done by checking off the **"Scan Duplex"** option prior to clicking on the 'Scan' button. Multi-page scanning can be accomplished by checking off the **"Scan to Single Doc"** option prior to clicking on the 'Scan' button.



Scanning color documents and changing scanning resolution

Color scanning can be done by selecting the color mode prior to clicking on the 'Scan' button.

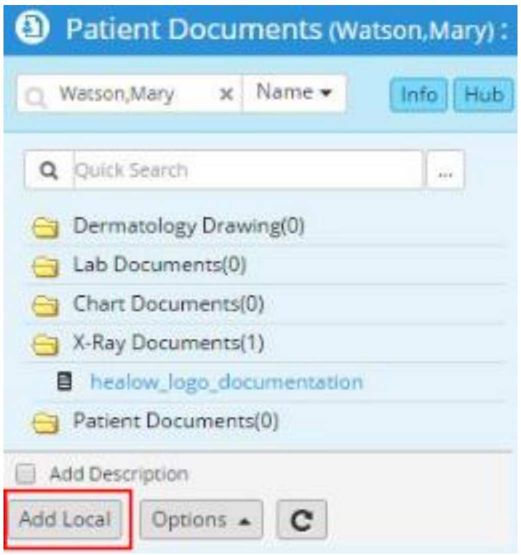
Scanning resolution can be changed by adjusting the DPI value. Default DPI and pages can be defaulted under settings.

Adding Documents from Local

Path: *Main Menu > Documents icon > Patient Documents*

To add a document from the local machine:

1. Select the patient.
2. Select the applicable *Document Category*.
3. Click the *Add Local* button:



4. Browse the local file.
5. Select the document.
6. Click *Open*.

   The document is added.

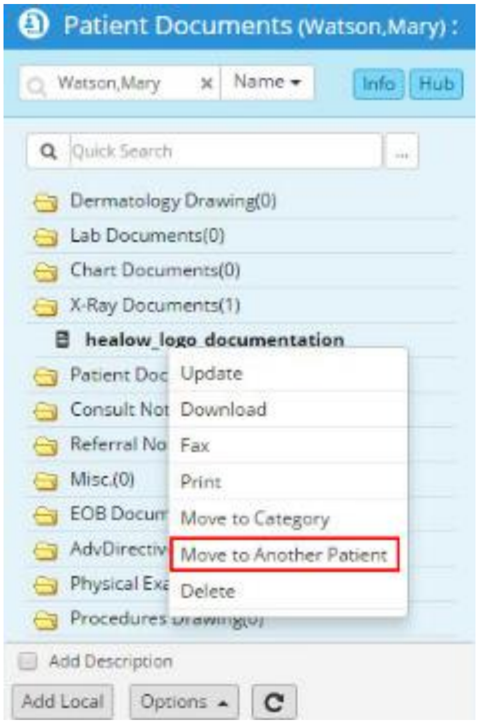
Moving Documents from One Patient to Another

Path: *Main Menu > Documents icon > Patient Documents*

To move the document to another patient:

1. Select the patient.
2. Select the applicable *Document*.
3. Right click the document and select the *Move to Another Patient* option:
4. From the Patient text field, enter the *Patient Name*.

5. Click *OK*:



The Patient Documents window opens.

6. From the Patient text field, enter the *Patient Name*.
7. Click *OK*:

Note: The recommended naming convention to be followed when adding scanned documents into the respective folders is to "YYYY/MM/DD; County; NameOfDocument". For example, if you are scanning a lab result that was received on the 1st of April, 2011, the scanned document should be named as '2011/04/01; CBC Result'. This recommended naming convention makes it easy to sort the documents in chronological order.

Electronic Faxing

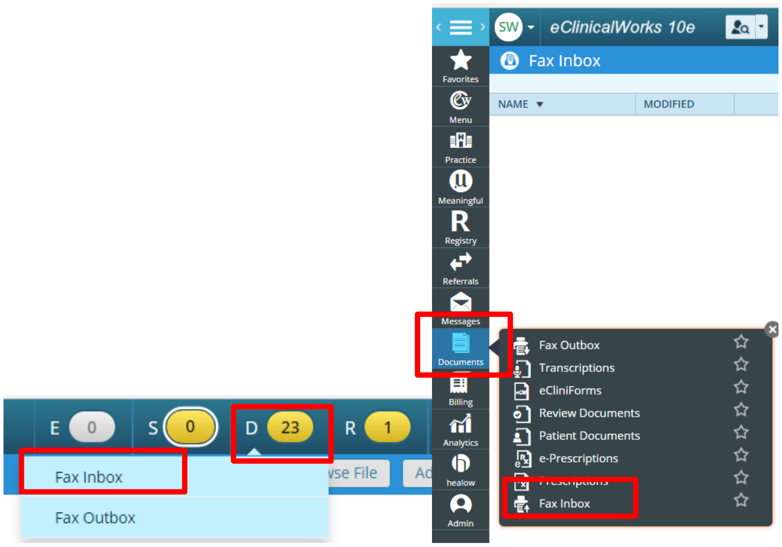
Incoming Faxes

As introduced in the previous section, eClinicalWorks includes a document management feature which allows external entities to fax the document directly into eClinicalWorks. The document then can be attached to the patient's electronic chart.

Path: *Main Menu > Documents icon > Fax Inbox*

OR

D Quick-Launch link > Fax Inbox



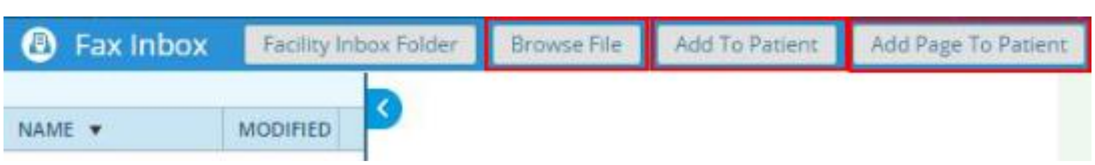
Prior to receiving the faxed document, the practice administrator maps the eClinicalWorks application to the fax inbox for each facility by typing the fax inbox folder's location on the *Fax Server* window. The *Fax Server* window is accessed from the *Fax Server* tab in the *eCW Menu*.

To attach received faxes to the respective patients:

1. Click the *Browse File* button to add a faxed document.
2. In the Browse window select the document, and click *Open*.
3. In the Fax Inbox, select the document and click the *Add To Patient* button.

   OR

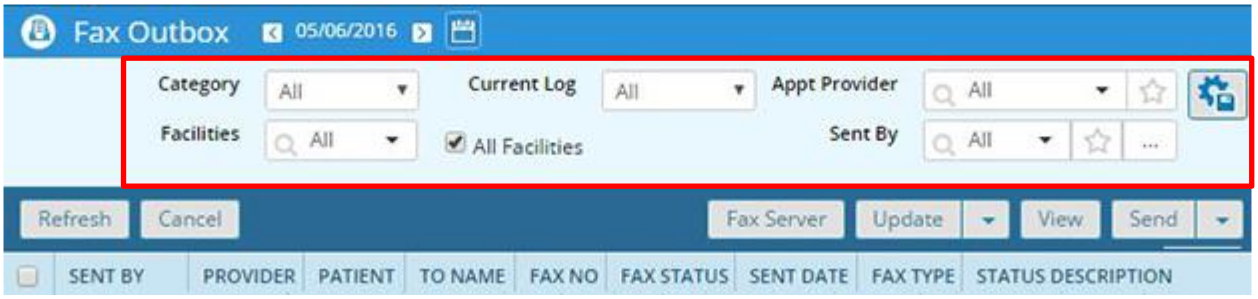
   To add the individual pages from the received fax, click the *Add Pages To Patient* button:



Outgoing Faxes

Path: *Main Menu > Documents icon > Fax Outbox*

eClinicalWorks allows users to electronically fax documents from the application. User can use the fax feature by clicking on the *Fax* button from various section of the application (Ex. Progress Notes, Patient Documents, Lab/DI Order, *etc*.). Once the document(s) is faxed out, the user can monitor the status of the (sent out) faxes through *Fax Outbox* window.

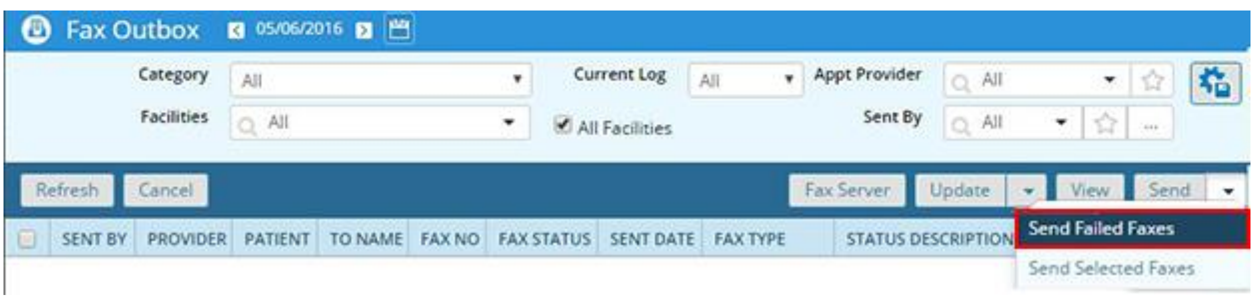


Resending Failed Faxes from the Fax Outbox

Path: *Main Menu > Documents icon > Fax Outbox*

To resend failed faxes:

In the Fax Outbox, from the *Send* drop-down list, select the *Send Failed Faxes* option:



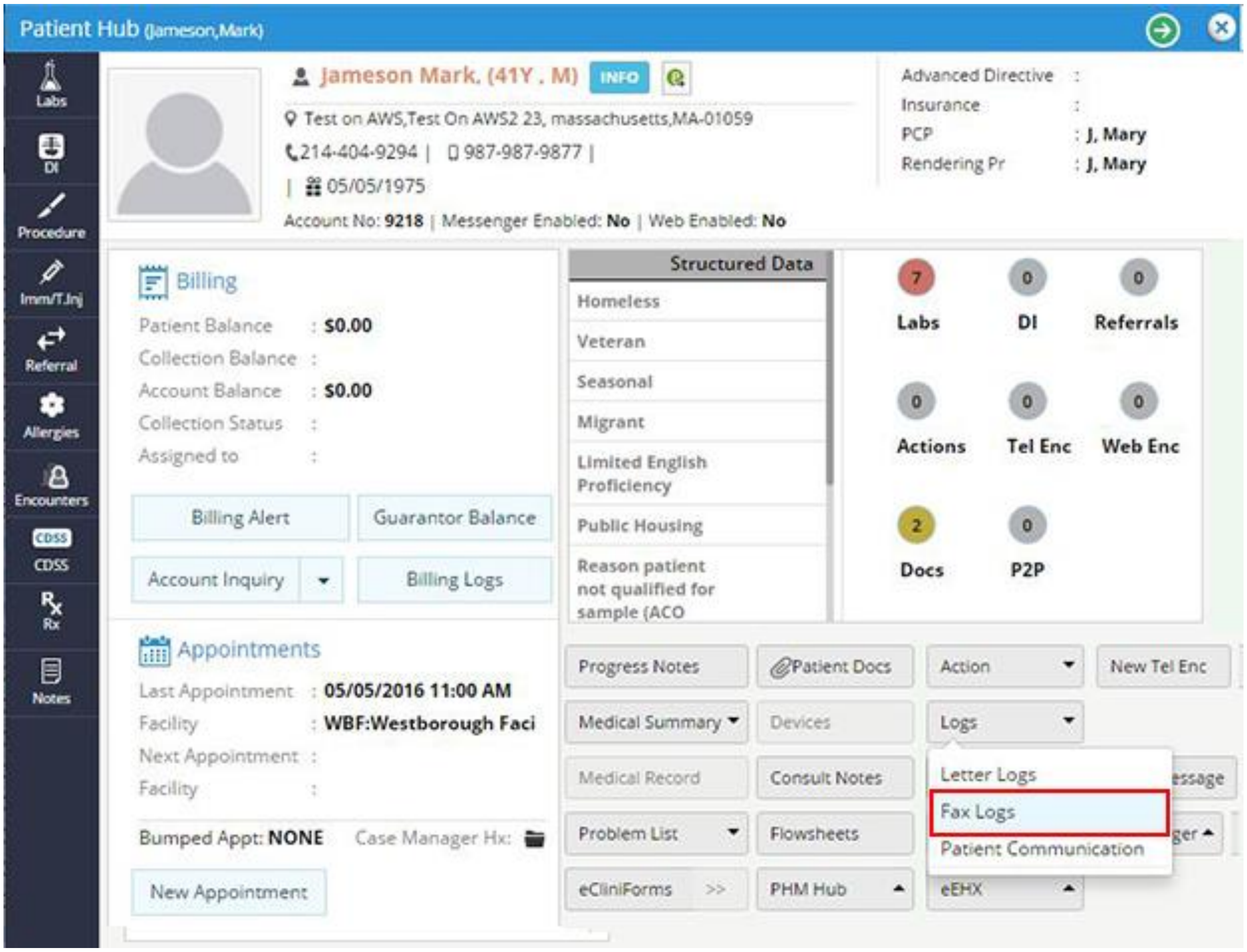
The fax server logs the request and begins transmitting the failed faxes.

Viewing Fax Logs in the Patient Hub

eClinicalWorks keeps a log of all faxes sent per patient.

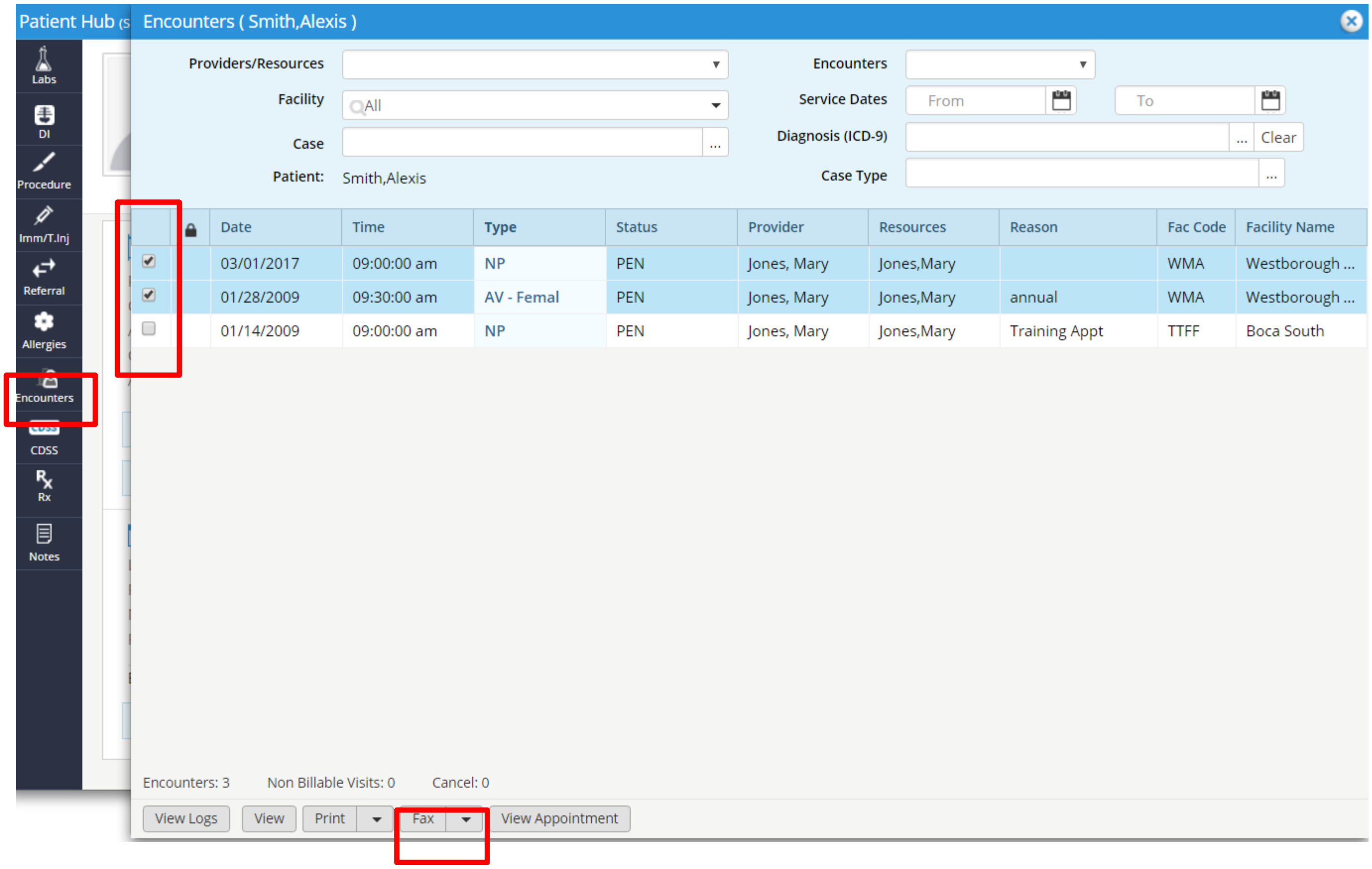
To view fax logs in the patient Hub:

In the Patient Hub, from the Logs drop-down list, select the *Fax Logs* option:



Faxing Multiple Documents from the Patient's Hub

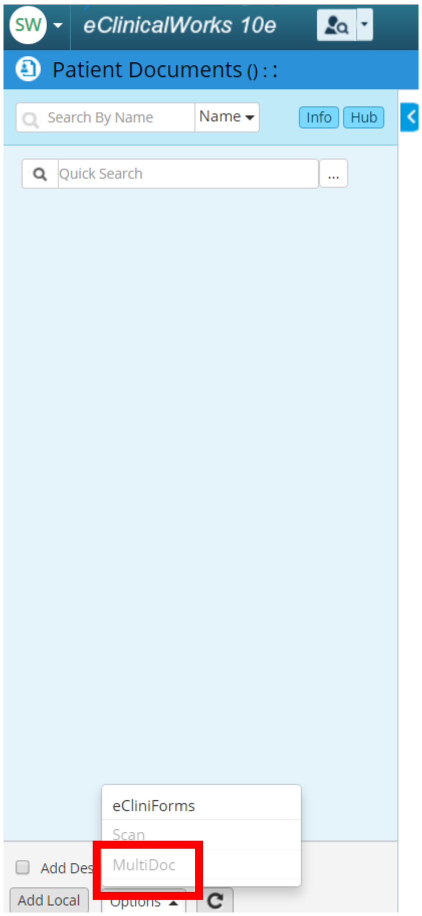
To fax out multiple progress notes for a patient, go to the patient's Hub and then click on the "Encounters" button. Select all of the encounters whose progress notes you want to fax out and then click on the "Fax" button.



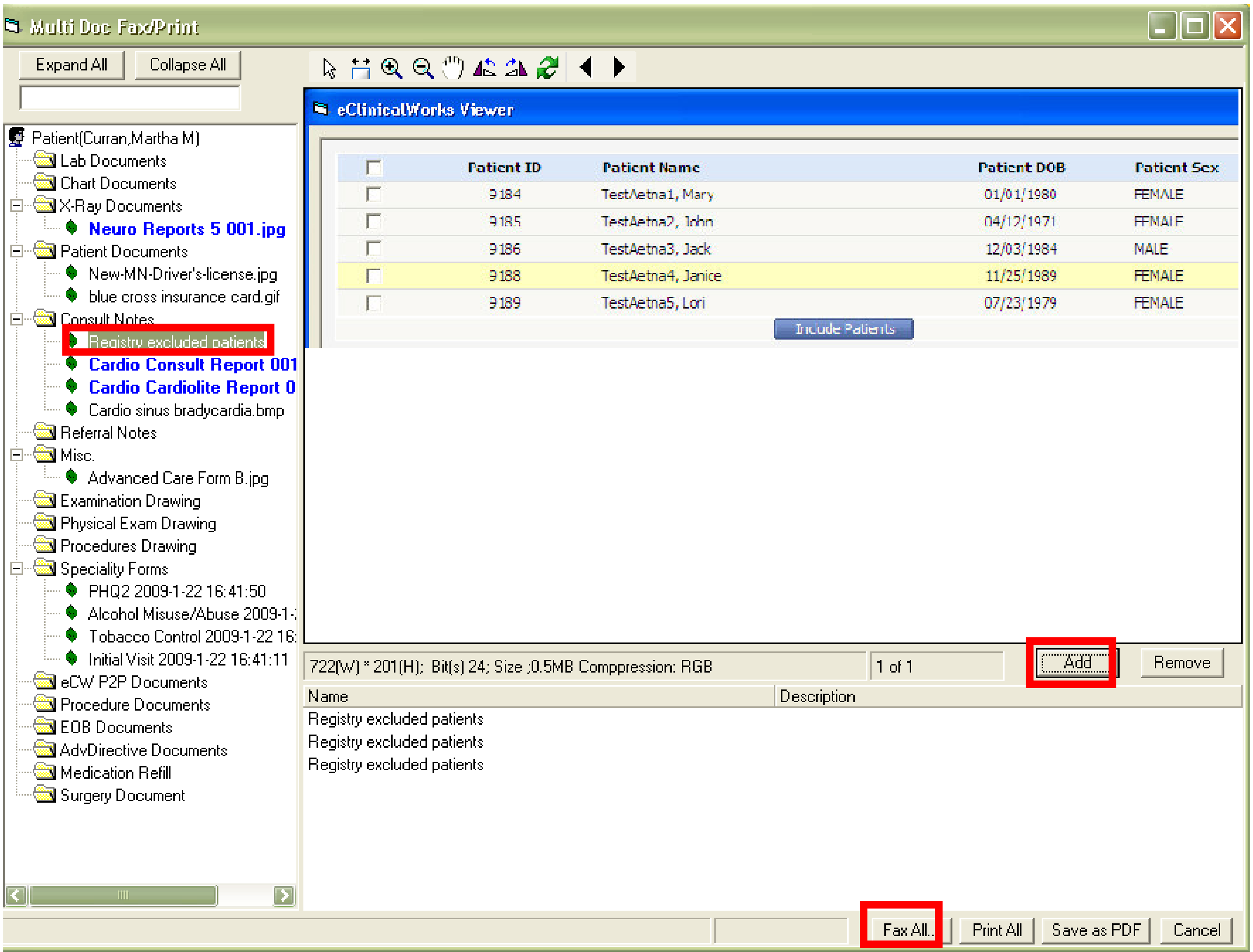
Faxing Multiple Documents from the Patient's Documents Window

To fax out multiple faxed/scanned documents from the patient's documents window:

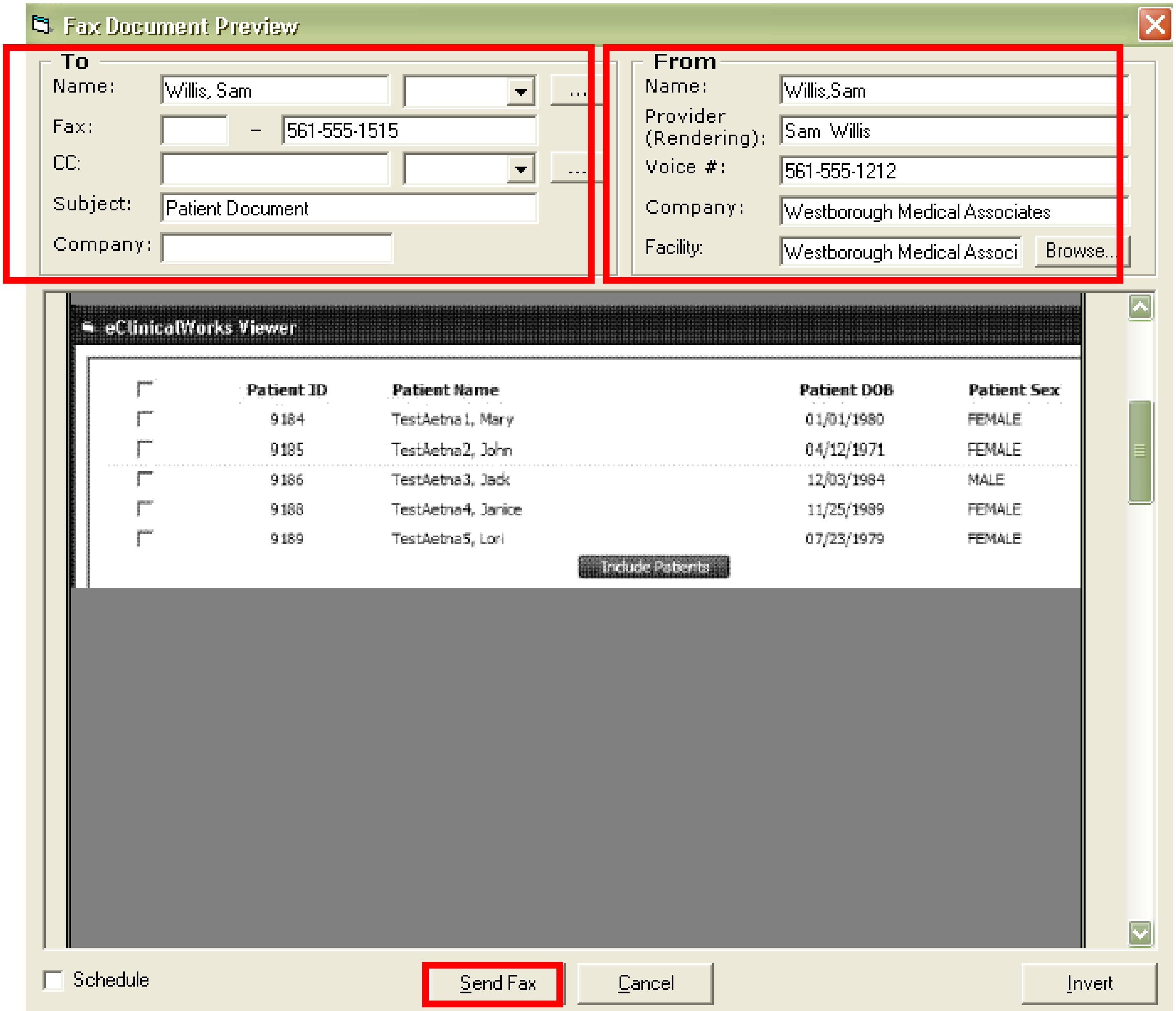
1. In the patient's Documents window, click on the "Multi Doc" button at the top of the screen.



2. One by one, select the documents that need to be faxed out and then click the "Add" button.
3. When finished selecting all of the documents, click on the "Fax All" button to fax the documents out.



4. Enter/select the destination in the appropriate field (i.e. name of the recipient, destination fax number, etc.)
5. Click “Send Fax”.

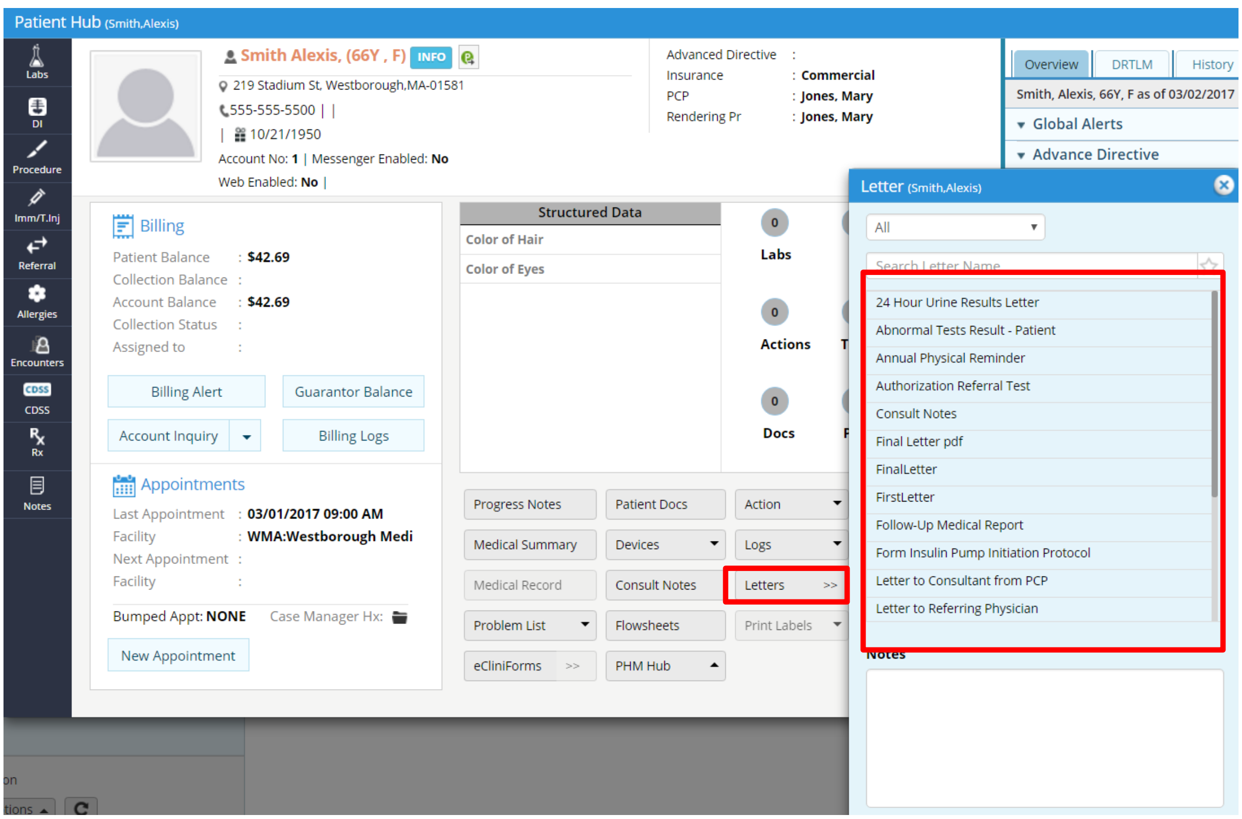

Fax Document Preview
To
Name: Willis, Sam
Fax: 561-555-1515
CC:
Subject: Patient Document
Company:
From
Name: Willis,Sam
Provider (Rendering): Sam Willis
Voice #: 561-555-1212
Company: Westborough Medical Associates
Facility: Westborough Medical Associ
Browse...
eClinicalWorks Viewer
Patient ID
Patient Name
Patient DOB
Patient Sex
9184 TestAetna1, Mary 01/01/1980 FEMALE
9185 TestAetna2, John 04/12/1971 FEMALE
9186 TestAetna3, Jack 12/03/1984 MALE
9188 TestAetna4, Janice 11/25/1989 FEMALE
9189 TestAetna5, Lori 07/23/1979 FEMALE
Include Patients
Schedule
Send Fax
Cancel
Invert

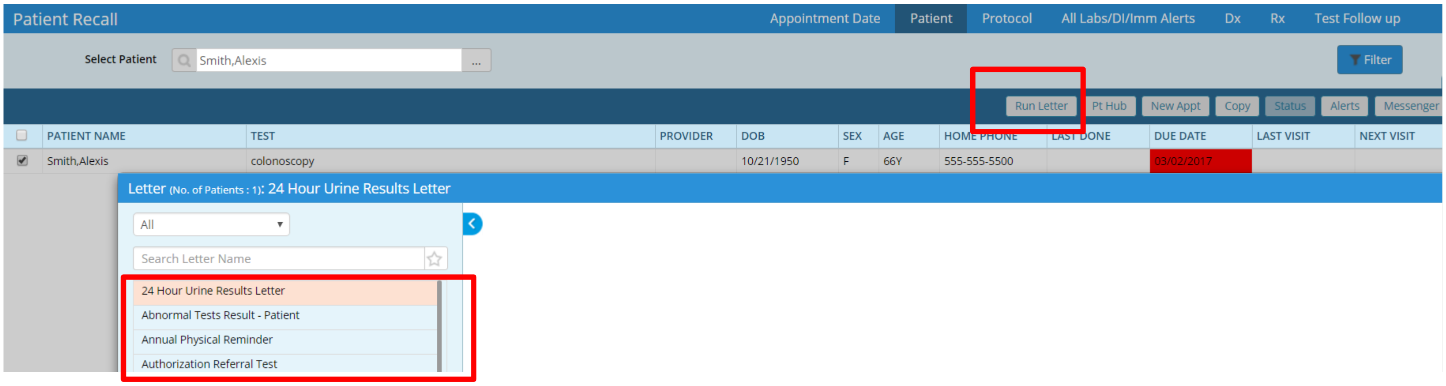
Letters

Generating and Printing Letters for an Individual Patient

Letter templates for commonly generated patient-specific letters can be set up as Microsoft® Word documents in eClinicalWorks. Once these letter templates are set up they can be printed for an individual patient by clicking on the “Letters” button from the patient’s Hub or clicking on “Letters” from the patient’s progress note and then following three simple steps as outlined below:

1. Click on the “Letter” […] button at the bottom left of the screen
2. Choose the letter template that has to be printed out for the patient.
3. Click on the “Run Letters” button to generate the letter for the patient as a Microsoft® Word document that can be printed out as required.





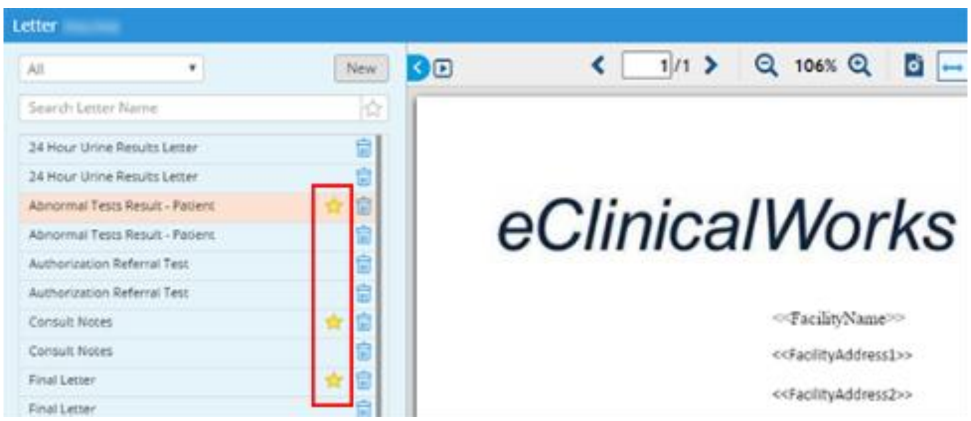
Favorite Letter Templates

Path: *Patient Lookup icon > Patient Hub > Letters*

Add letter templates to Favorite Letter Templates for easy access.

To add a letter template to the user's favorites:

1. From the Letters window, point to a letter and click the Star icon:

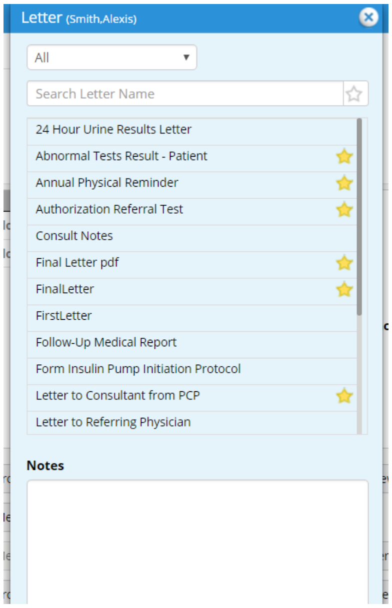


2. To filter the list of letters by favorite templates, click the Star icon next to the search bar.

Removing Letters from User Favorites

To remove letters from user favorite:

1. Open the Letters window from Patient Recall window.
2. Click the Star icon located above the list of letters. The list of the user's favorite letters displays.
3. Click the Star icon located to the left of the letter name to be removed from favorites. The letter is removed from the list of favorites.



Search Letters

The following enhancements have been made to the Letters:

- Previous and Next buttons have been added to the Letters window. Click these buttons to navigate to previous and next pages, respectively.
- By default, favorite letters display in the Letters window. To view all letters, click the yellow star icon.
- The Search field can be used to search among all letters and not just the favorite letters that display by default in the Letters window.

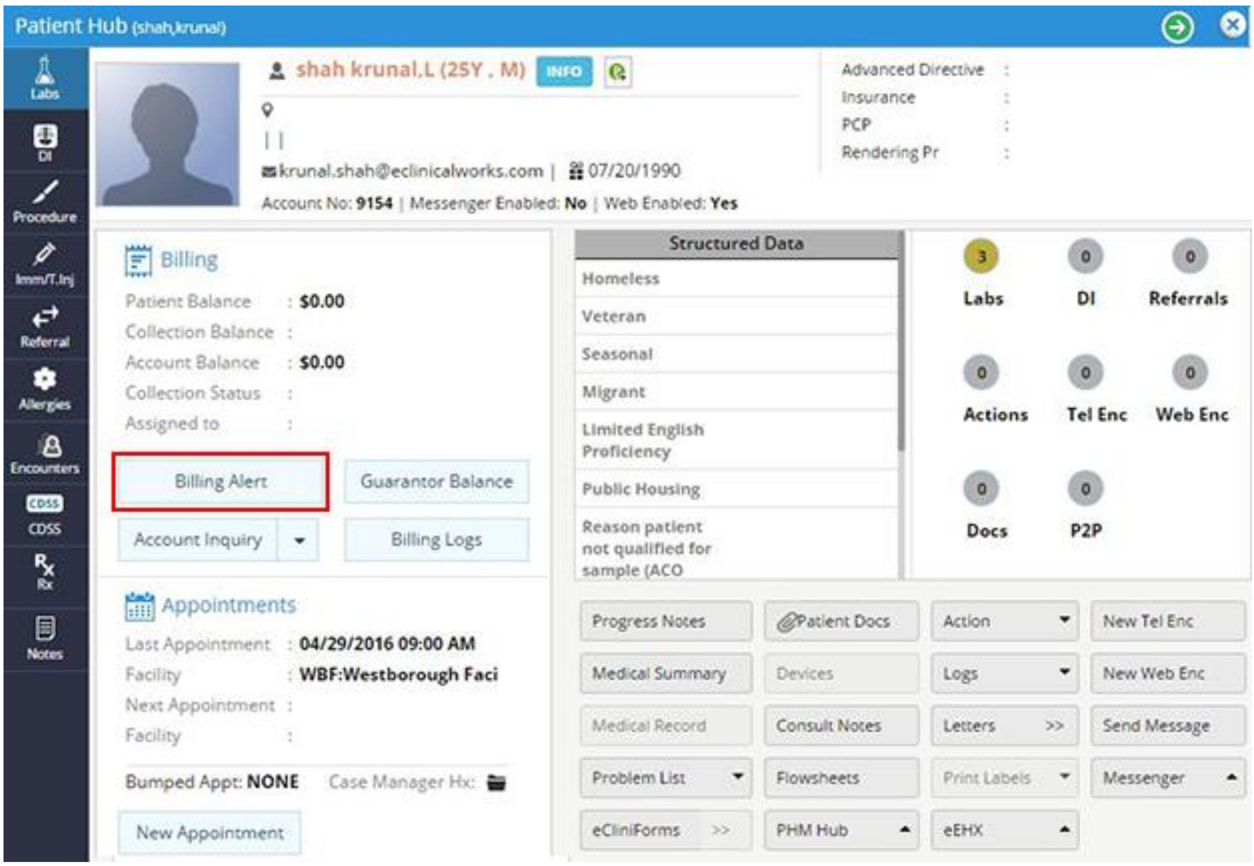
Patient Specific Alerts and Recalls

Global Alerts

Global Alerts can be configured from the Patient Hub. These alerts pop-up whenever the patient is selected from the Lookup window or when an appointment is modified for that patient.

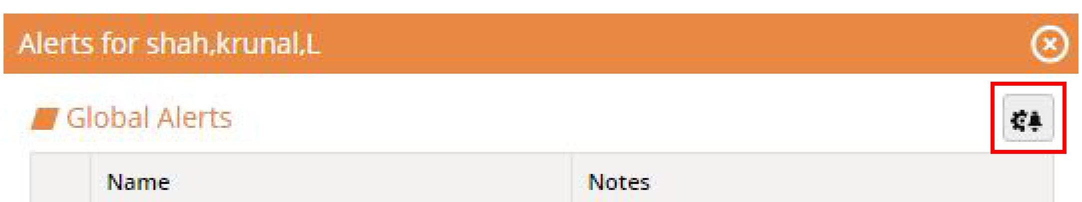
To assign a Global Alert for a specific patient:

1. From the Patient Hub, click the *Billing Alert* button:



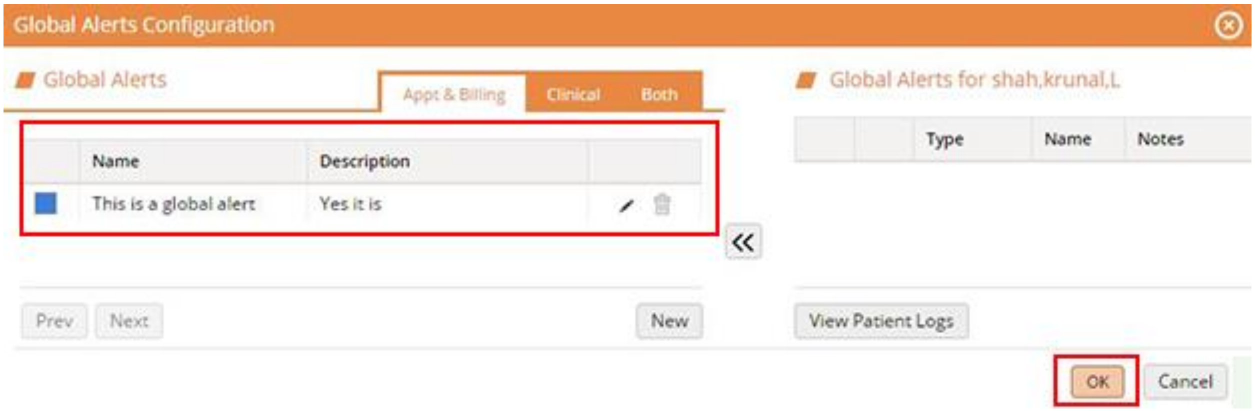
The Alerts window opens.

2. Click the *Update Global Alert* icon:



The Global Alert Configuration window opens.

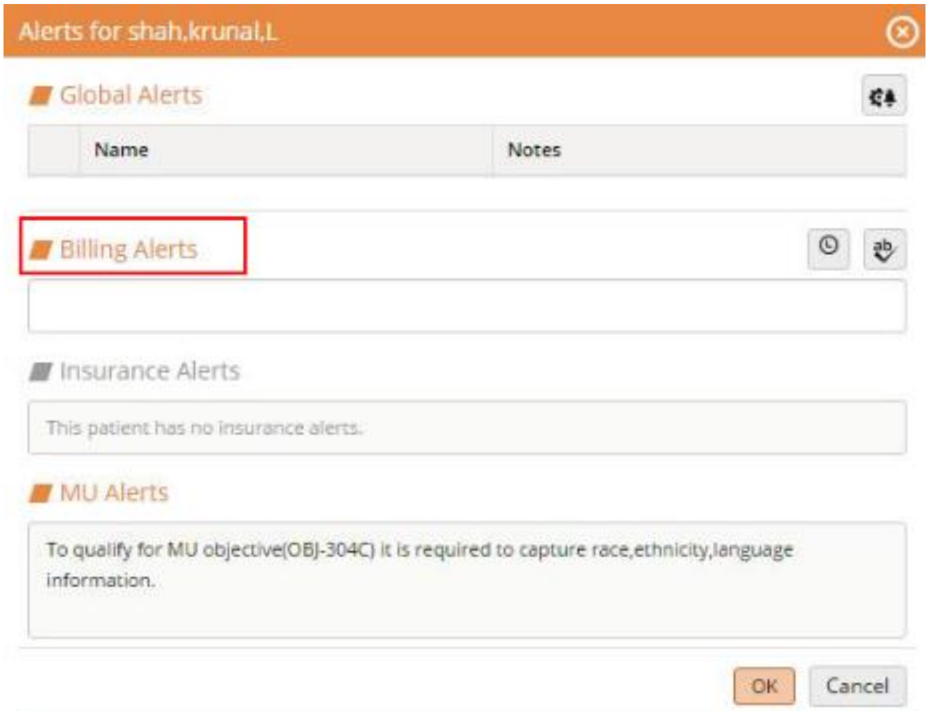
3. Enter a unique name and description for the alert in the *Name* and the *Description* fields.
4. Click *OK*:



Billing Alert

Path: *Patient Hub > Billing Alert button*

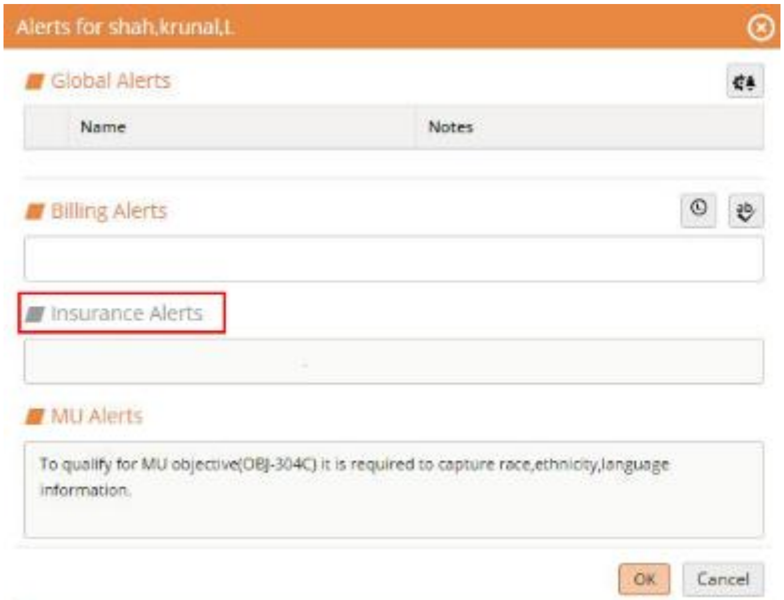
Billers add billing notes to a patient's account by configuring a Billing Alert. Front office staff can view these notes by clicking *Billing Alert* in the Patient Hub:



Insurance Alert

Path: *Patient Hub > Billing Alert button*

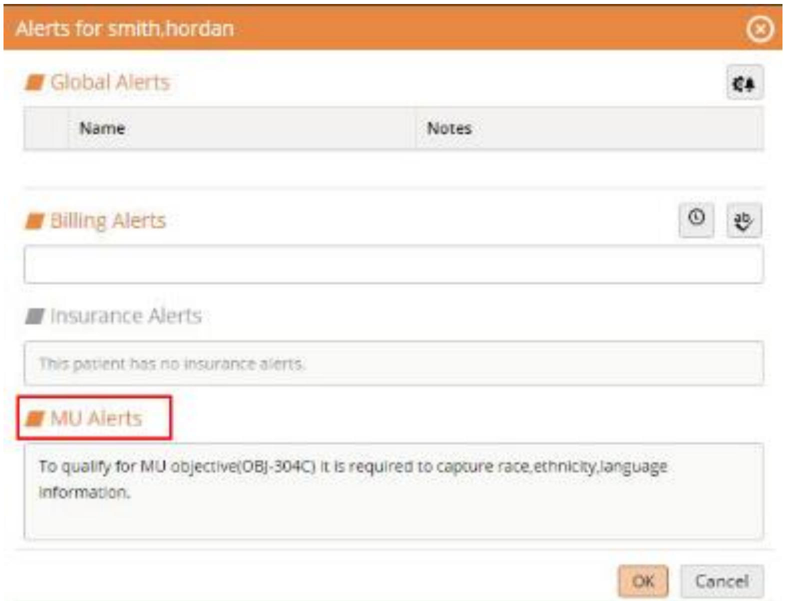
Insurance alert enables the billing department to broadcast a message for a particular insurance. Front office staff can view these notes by clicking *Billing Alert* in the Patient Hub:



MU (Meaningful Use) Alert

Path: *Patient Hub > Billing Alert button*

Meaningful User Alert pops up, if the MU required information is not captured in the patient's demographic. Front office staff can view this information by clicking *Billing Alert* in the Patient Hub:



The required information for Meaningful Use includes:

- Race
- Ethnicity
- Preferred Language
- E-Mail (For Patient Portal)

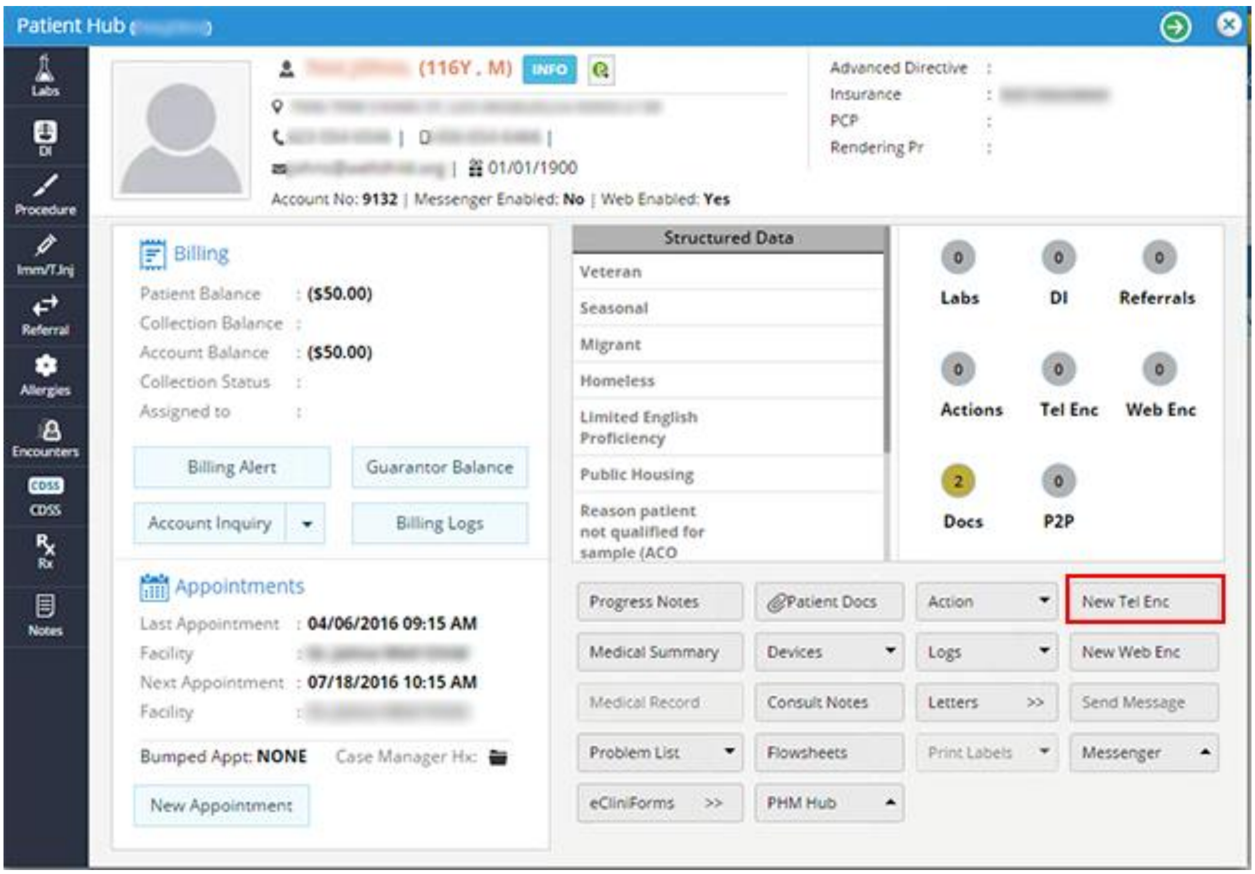
Telephone Encounters

Path: *Patient Lookup icon > Patient Hub*

Providers and staff can document telephone conversations with patients using the Telephone Encounters feature. Once documented, the Telephone Encounter can be assigned to different staff member in the practice for further action. For example, Telephone Encounters can be used to document medication refill requests, messages for the provider, or lab results requests.

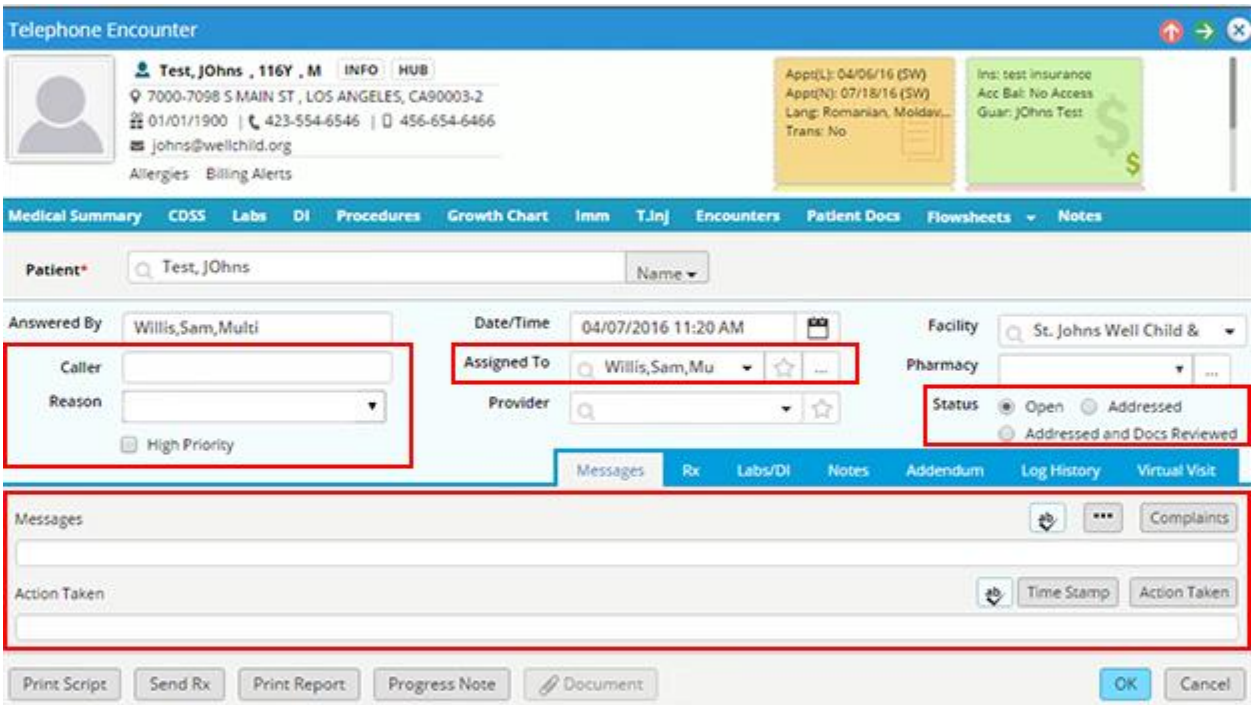
To create a Telephone Encounter:

1. From the Patient Hub, click the *New Tel Enc* button:



The Telephone Encounter window opens with the Patient and Answered By fields populated. The Answered By field populates with the user who created the Telephone Encounter.

2. From the Telephone Encounter window, enter the name of the *Caller* and the *Reason* for the call.
3. Document the message in the *Messages* field, and enter any action taken in the *Action Taken* field.
4. Assign the Telephone Encounter to a provider or staff member.
5. (*Optional*) Check the *High Priority* box to indicate that the encounter requires immediate attention. The D Quick-Launch icon for the *Assigned To* staff member will display red.
6. After the issue has been addressed, select the *Addressed* radio button:



7. Click *OK*.

Telephone Encounter Tabs (Overview)

Path: *Patient Lookup icon > Patient Hub > New Tel Enc button*

The following tabs are available in the Telephone Encounter window:

Tab	Description
▪ **Rx**	Access the patient's current medication and prescription history, and refill selected medication.
▪ **Labs/DI**	Access the patient's lab and DI results.
▪ **Notes**	Document additional notes.
▪ **Addendum**	Document additional details after the Telephone Encounter has been marked as *Addressed* (locked).
▪ **Log History**	Review the user access logs for this Telephone Encounter.
▪ **Virtual Visit**	Access the Virtual Progress Notes for this Telephone Encounter.

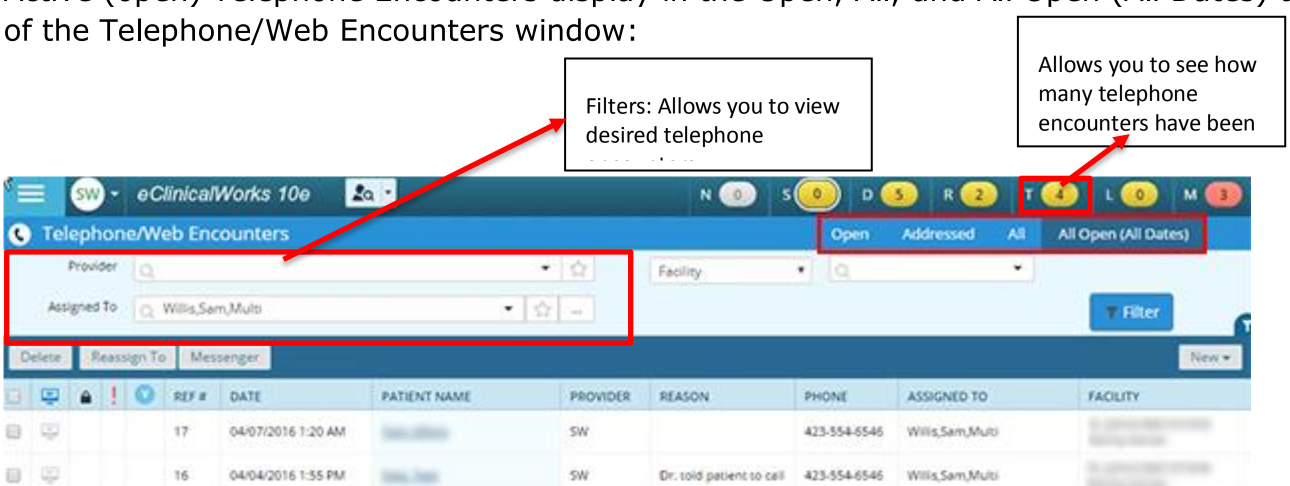
Note: It is strongly recommended that the Telephone Encounter feature be used to document phone messages that must be part of the patient's medical records, including front office, clinical, or billing-related phone calls.

Looking Up Assigned Telephone Encounters

Path: *T Quick-Launch button*

The number in the T Quick-Launch button indicates the number of Telephone Encounters that have been assigned to the user. The button displays red to indicate that a High Priority Telephone Encounter has been assigned to the user.

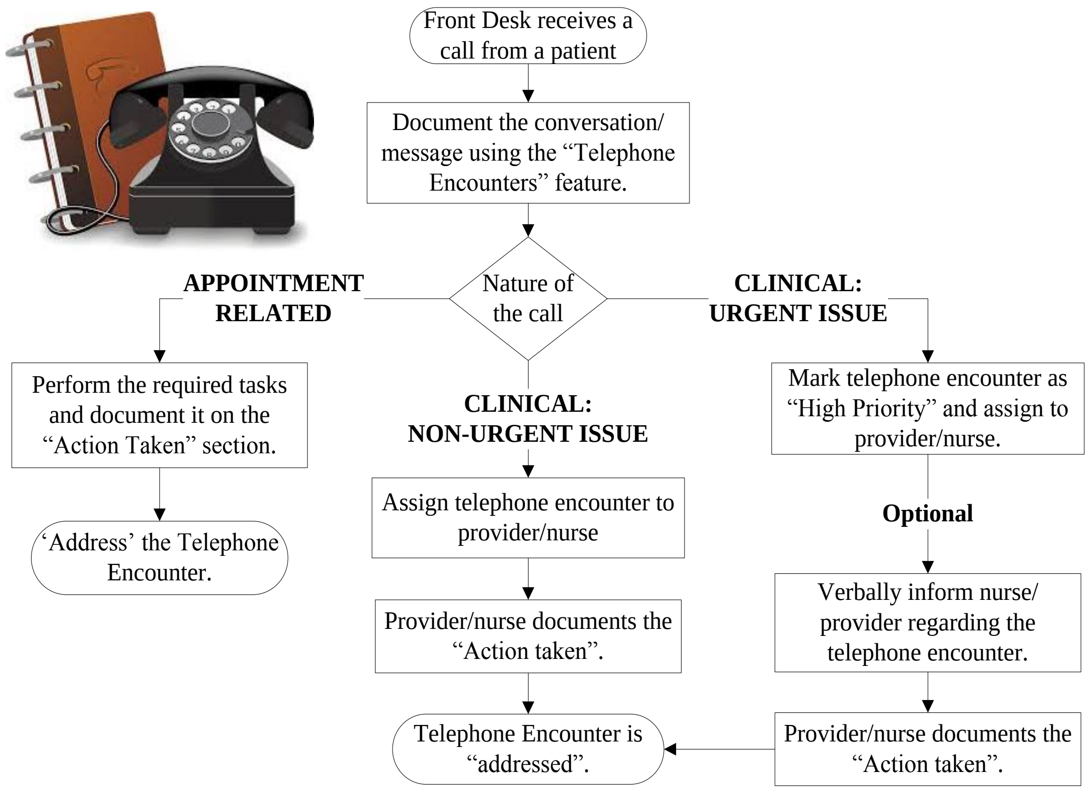
Active (open) Telephone Encounters display in the Open, All, and All Open (All Dates) tabs of the Telephone/Web Encounters window:



Use the filters to search for specific encounters.

Once a Telephone Encounter has been marked as *Addressed,* it displays in the Addressed tab.

Telephone Encounter Workflow



Appendix A: Notices

Trademarks

eClinicalWorks®

eClinicalWorks® is a registered trademark of eClinicalWorks®, LLC.

All other trademarks or service marks contained herein are the property of their respective owners.